Connecting a Bank Account



Choose Lists menu > Chart of Accounts.

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Right-click on an account you would like to activate and choose Edit Account.

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- (1) Select Set Up Bank Feeds on the bottom of the popup screen.
- (2) Select **Yes** in the dialog box that will appear.

Step 1: Find your bank	
Enter your bank's name	

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Select Bank	2
Examples: Bank of America, Citibank, American Express.	
Matching Results	
Select Bank-VA	
Select Bank-VA-QBDC	
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Showing 1-2 of 2	

Enter 'Select Bank' in the search field and select **Select Bank-VA-QBDC**. (QBDC stands for 'QuickBooks Direct Connect'.)



Select Continue.



Enter your Select Bank online banking credentials. Contact your branch if your login information does not work. Select **Connect.**



You will see your Select Bank accounts that are not yet connected to QuickBooks displayed. * Using the drop-down menu next to the listed bank account(s), select the QuickBooks account with which you wish to link it. If necessary choose < Create New Account >. ** When finished, select Connect.

*If you don't see your desired account it is likely already connected to QuickBooks.

**See 'Creating New Account in QuickBooks' Instructions



View the confirmation screen and select **Close**.

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Choose Lists menu > Chart of Accounts.

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Select the desired account by double-clicking.

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Select Download Transactions.

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In the blue box with the account's information, select the **Refresh Icon** next to the icon of the building.



Enter your Select Bank password to confirm the download of the transactions. Select **OK**.

	Bank and Credit cards	Select Bank-VA-QBDC	
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After reviewing summary window, select **Close**.