

# Download Bank Feed transactions in QuickBooks Desktop

1. From the **Banking** menu, go to **Bank Feeds** then **Set up Bank Feeds to an account**.
2. In the Enter your Bank's name field, enter and select **Mountain West Bank-DC**.
3. Connect your bank:
  - o If it's enrolled already, select **Continue**. Then, follow these steps:
    - a. Enter your Online Banking ID and Password.
    - b. Select **Connect**. QuickBooks connects to the bank's server.
    - c. Select the bank account you want to connect to QuickBooks.
    - d. Select **Finish** after the process completes.

The screenshot shows the 'Step 2: Connect' window in QuickBooks. At the top, it says 'Bank to QuickBooks' and 'Fees will apply'. A progress bar at the top right shows four steps: 1. FIND (checked), 2. CONNECT (active), 3. LINK, and 4. DONE. Below the progress bar, there is a link: 'Want more options? Use Advanced Setup.' The main area contains two input fields: 'Bank ID For your account' and 'Bank Password For your account'. To the right of these fields is the QuickBooks logo and the text 'Service provided by http://www. .com'. Below the logo, it says 'Use your Bank user ID and password to sign in here.' At the bottom right, there are two buttons: 'Back' and 'Connect'. At the bottom left, there is a link: 'How does QuickBooks protect my financial information?'.

## Download using Direct Connect

The first time you connect, QuickBooks automatically downloads the maximum number of transactions available which is the previous 90 days.

1. Go to the **Banking** menu.
2. Hover over **Bank Feeds** and select **Bank Feeds Center**.

3. From the Bank Accounts list, choose the account you want to connect. (Optional) In the **Send items to your bank** section, you can edit or delete items by clicking the drop-down.
4. When you're ready to get your transactions, select **Download Transactions**.

**Note:** If you already downloaded the transactions but haven't reviewed them yet select **Transaction List**. Here's [how to review them](#).

5. Select **Synchronize**. If you only want to download transactions for a specific account, select **Sync this account**. Or if you want to download transactions for all your accounts at the same bank, select **Sync all for this Bank**.
6. In the Access to window, enter your PIN or password to connect to your bank.
7. Select **OK**.

**\*\***After you download the transactions, you need to [match or add any new ones](#).

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## Connect bank accounts to QuickBooks Online

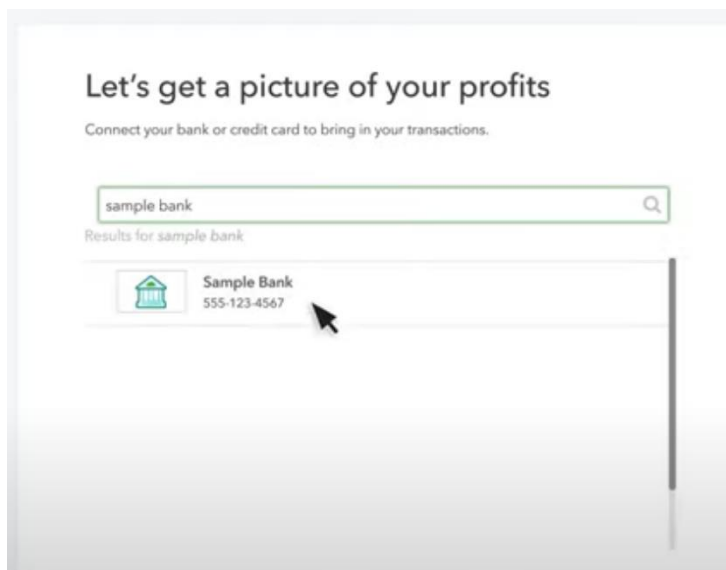
### Step 1: Connect a bank account

You can connect as many business and personal accounts as you want.

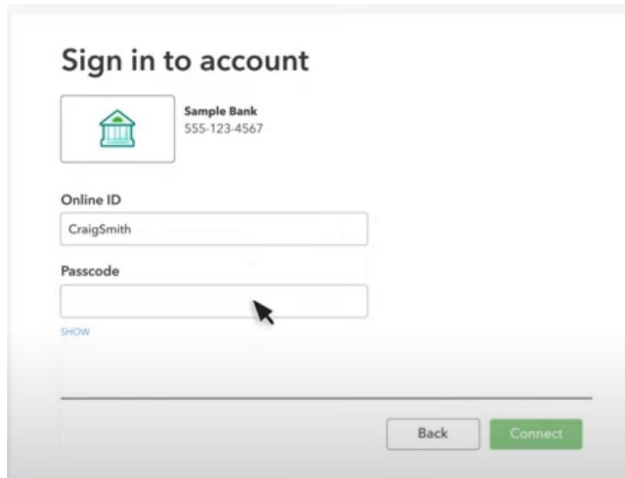
1. Go to **Bookkeeping**, select **Transactions**, and select **Banking** ([Take me there](#)).
2. If this is the first bank account you've set up, select **Connect account**. Or select **Link account** if you already created one.

**Note:** If you come over from QuickBooks Desktop, you'll have to connect your bank accounts again for security reasons.

3. In the search field, enter and select **Mountain West Bank**.



4. Select **Continue**. Then sign in with your bank user ID and password.



The image shows a 'Sign in to account' form for 'Sample Bank' with the account number '555-123-4567'. The form includes a logo of a green building, an 'Online ID' field with the text 'CraigSmith', and a 'Passcode' field. A mouse cursor is pointing at the 'Passcode' field. Below the fields is a 'SHOW' link. At the bottom are 'Back' and 'Connect' buttons.

5. Select **Connect**. It could take a few minutes to connect.
6. Select the accounts you want to connect, then select the **account type ▼** dropdown. Choose the account type that matches **your chart of accounts** in QuickBooks.
7. Select how far back you want to download transactions. You can download the last 90 days of transactions.
8. Select **Connect**.

## Step 2: Download recent transactions

QuickBooks downloads transactions so you don't have to enter them manually. Refresh the bank feed to download your latest transactions.

1. Go to **Bookkeeping**, select **Transactions**, and select **Banking (Take me there)**.
2. Select **Update**.

## Step 3: Categorize downloaded transactions

Once QuickBooks downloads your transactions, you'll need to **review and categorize your transactions** to make sure they're categorized correctly.