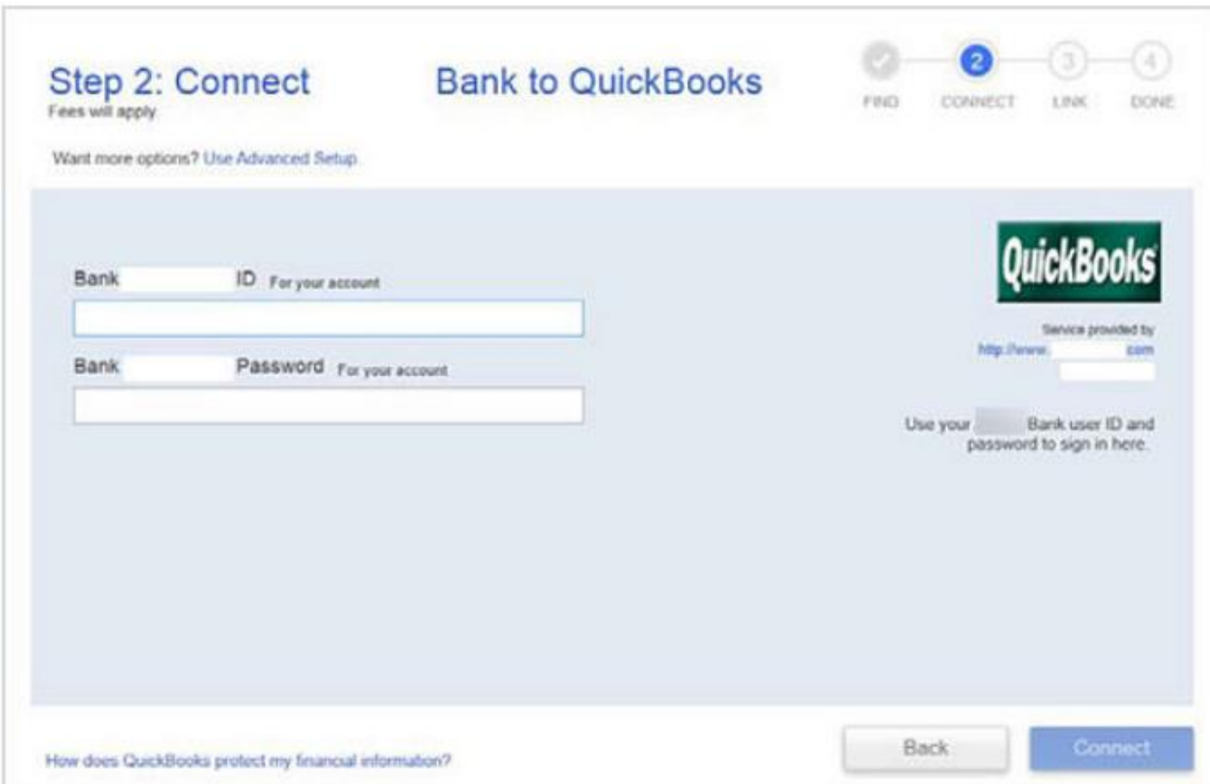
Download Bank Feed transactions in QuickBooks Desktop

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:
   - 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.



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**.

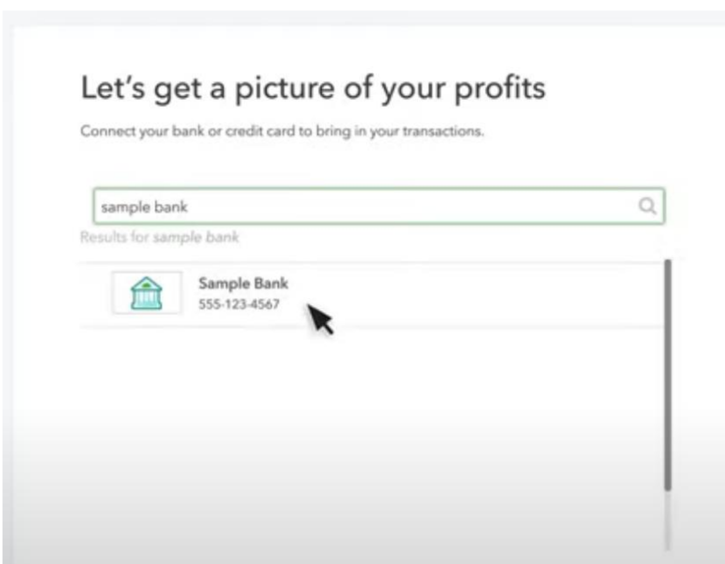
**After you download the transactions, you need to match or add any new ones.

Connect bank accounts to QuickBooks Online

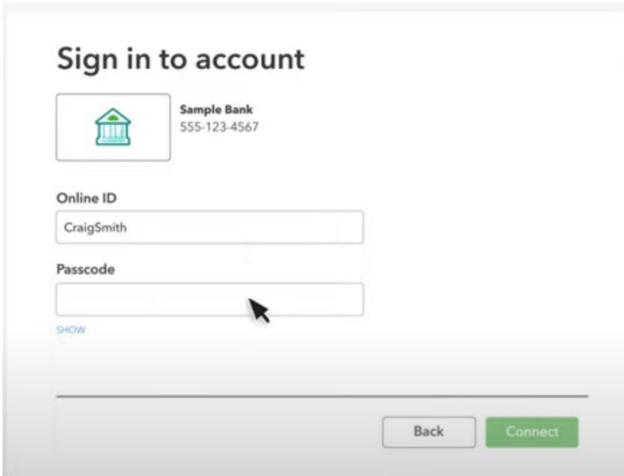
Step 1: Connect a bank account

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.



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.