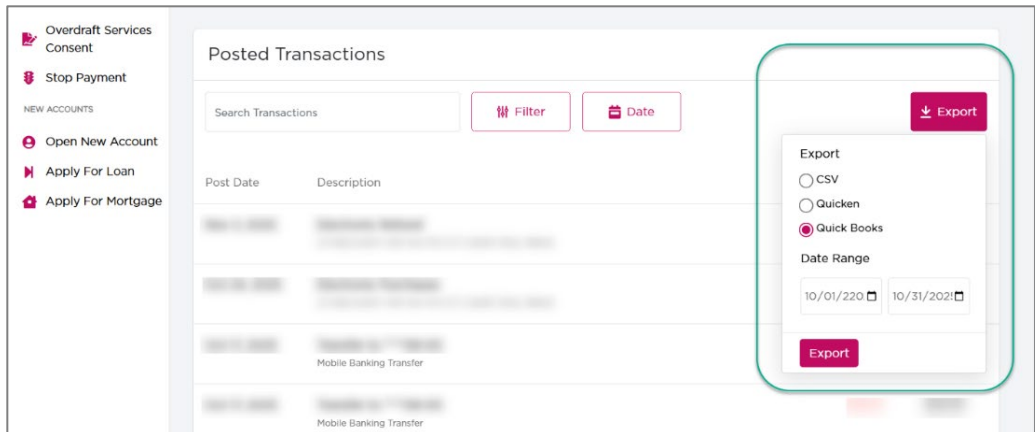




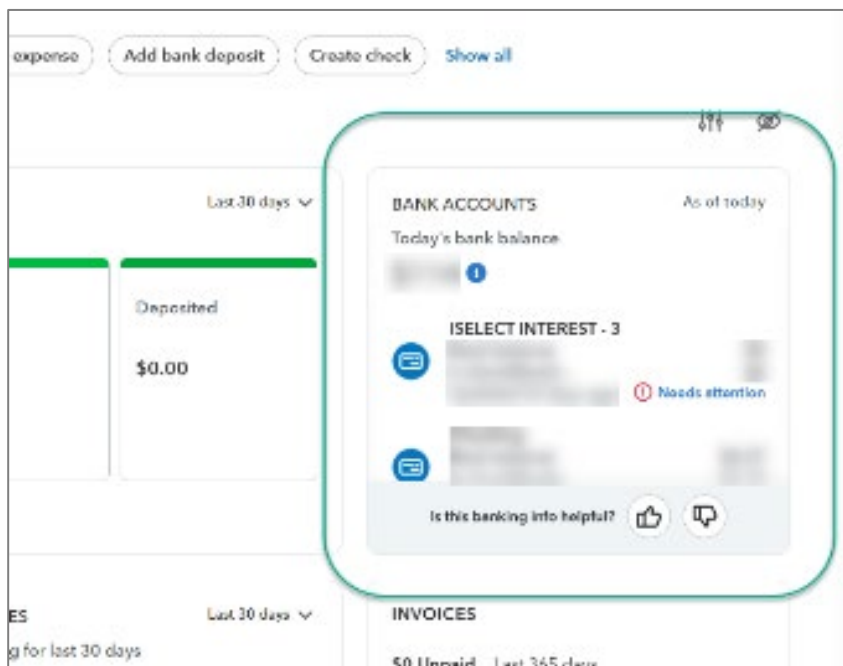
Exporting Transaction Data from Online Banking:

- Log into [Online Banking](#) (browser)
- Click on the account you wish to export data for, which opens the Account Details page
- On the Posted Transactions section, click '**Export**', choose '**Quick Books**', select the desired date range, and click '**Export**'

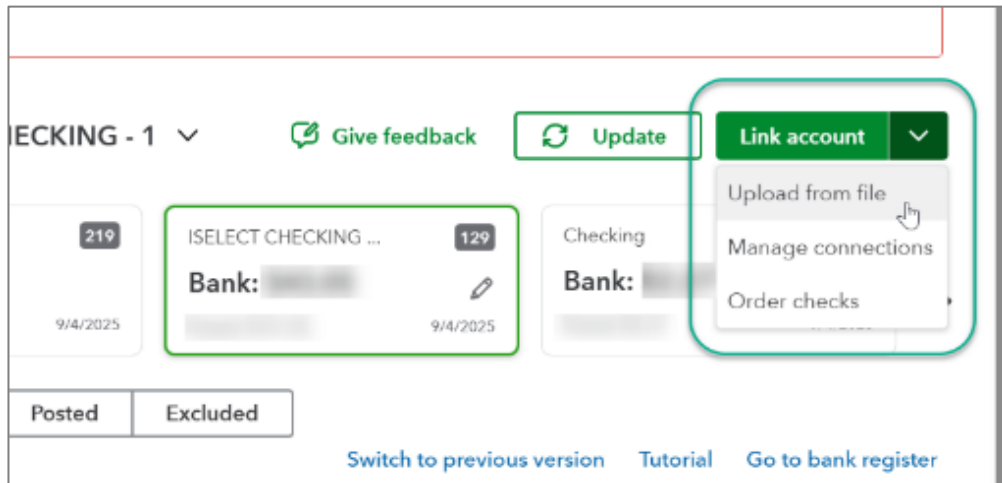


Importing Transaction Data into QuickBooks Online:

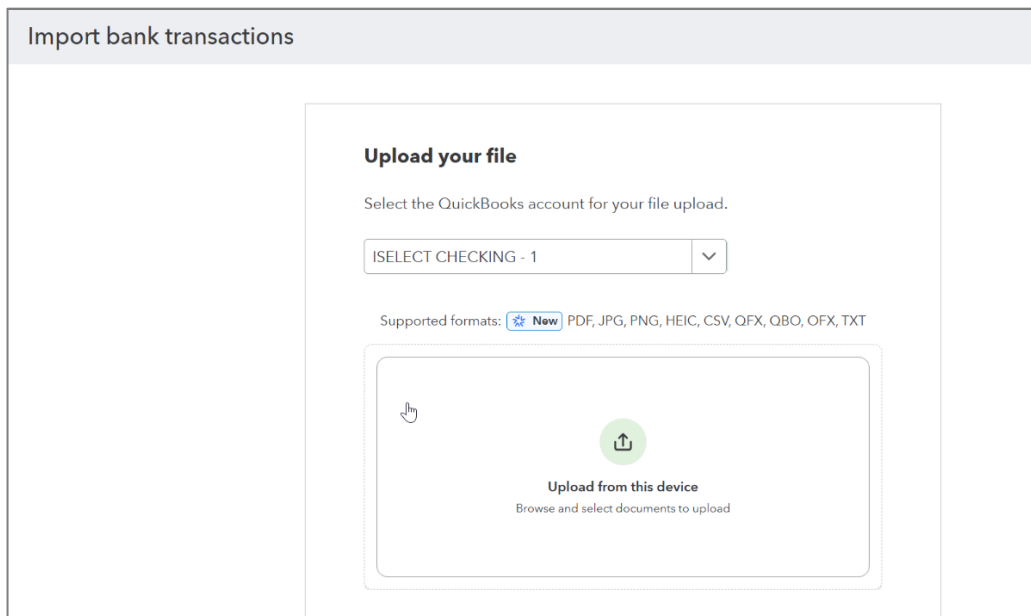
- Log into [QuickBooks Online](#). This should bring you to the Dashboard
- On the '**Bank Accounts**' widget on the Dashboard, click on the desired account



- Click on the **'Link account'** dropdown arrow (green) and choose **'Upload from file'**



- On the **'Import Bank Transactions'** page, choose the account you're uploading transactions for from the dropdown, then drag the previously downloaded file onto the **'upload from this device'** panel.



- If prompted, select the correct account, and click **'Continue'**

Import bank transactions

✓

2

3

4

Which account are these transactions from?

Selected File: [transaction-history.qbo](#)

Uploaded Account

Checking

2025-10-01 - 2025-11-01

⇄

QuickBooks Account

ISELECT CHECKING - 1 ▼

Back

Continue

- Import completed. Click **'Done'**

Import bank transactions

✓

✓

✓

Import completed

Next step: Accept your transactions

You're in control of how your bank info goes into QuickBooks. Transactions only show up in your books after you review and accept them.

Done

- After clicking **'Done'** the user will automatically be shown that account in QuickBooks, with the newly uploaded transactions