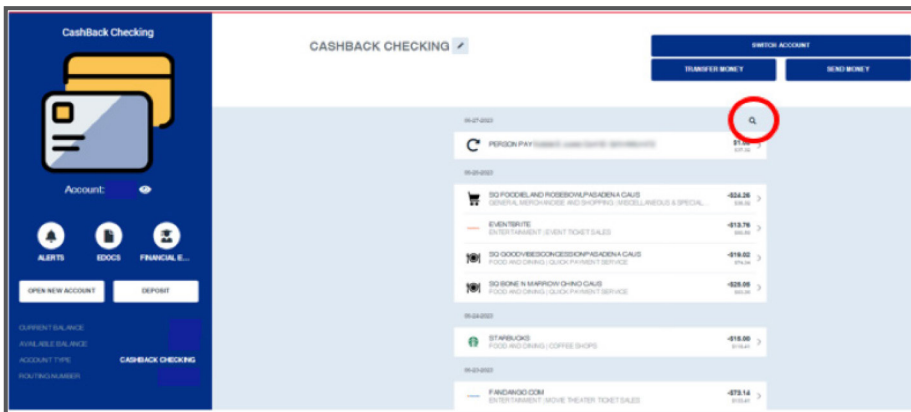
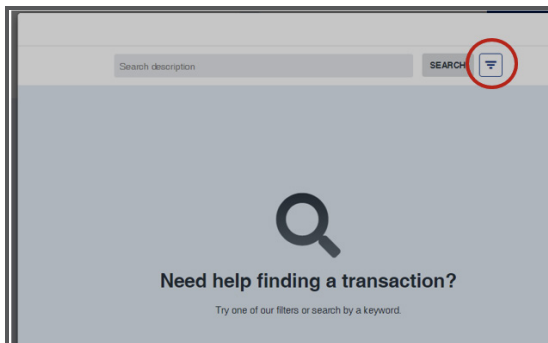




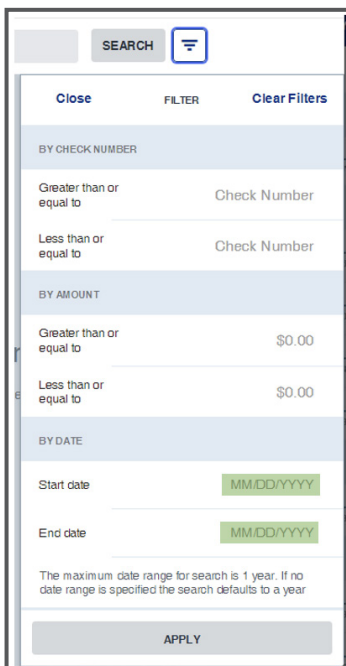
How to load transaction history into Quickbooks



In the account [click] the magnifying glass.

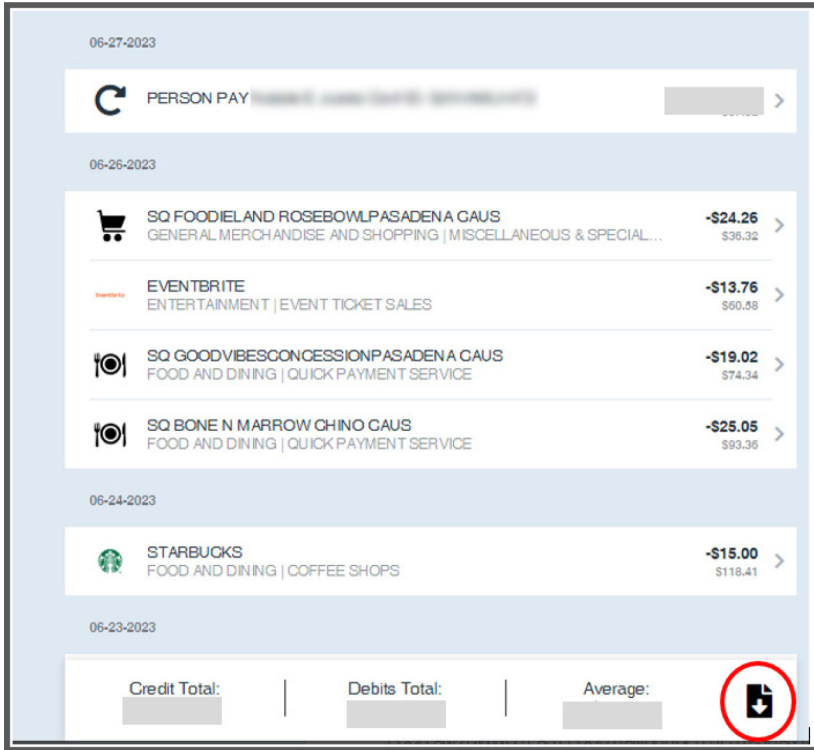


Once the pop-up opens you will then [click] on the hamburger.

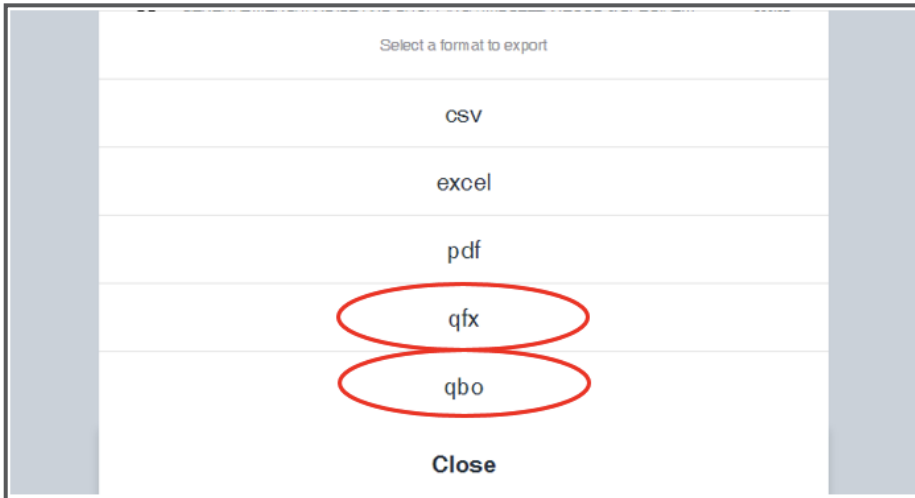


You have 3 options on how to search:

- Check Number
- By Amount
- By Date
- You will only search by date to download transactions

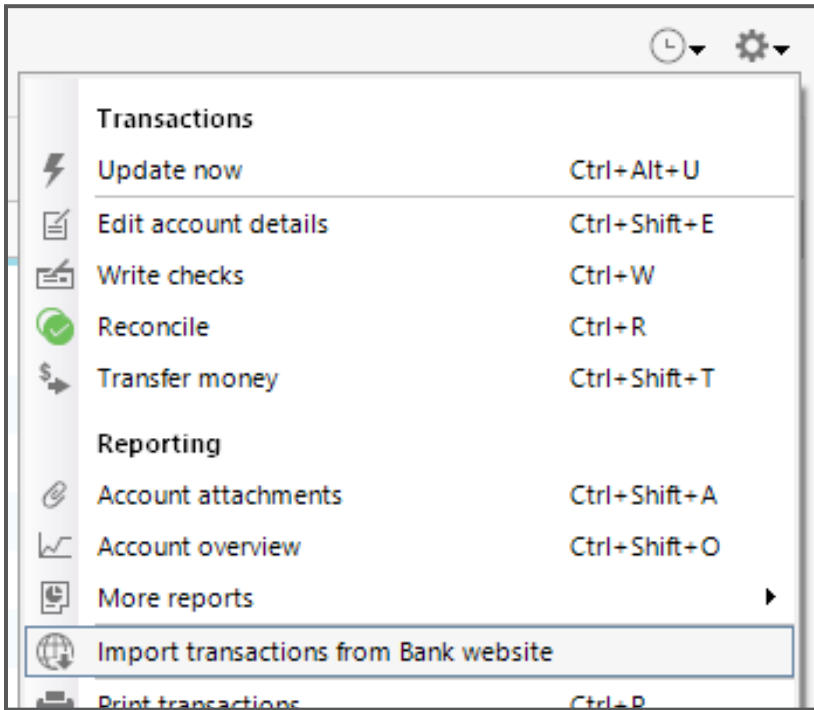


After that loads and gives you the list of transactions, you will [click] on the document icon.



You will have a pop up and will choose **qfx** for **Quicken** and **qbo** for **QuickBooks**. Choose 1 to download.

In Quicken, select **Import transactions from Bank website** from the Setting menu.



Select the account to import to from the dropdown and drag and drop the downloaded QFX file or click Browse and navigate to it.

