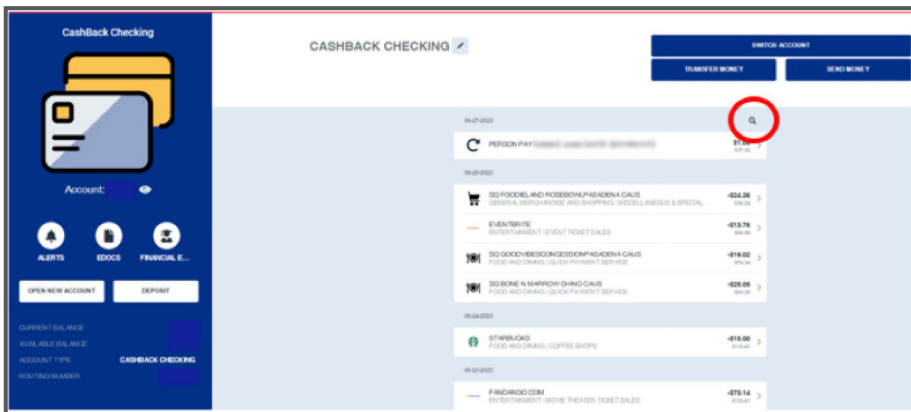
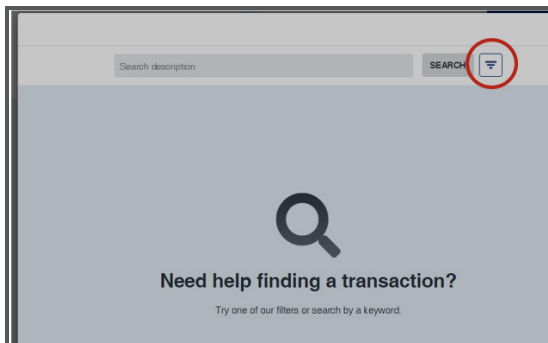




# How to load transaction history into Quickbooks



In the account [click] the magnifying glass.



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

SEARCH

Close FILTER Clear Filters

BY CHECK NUMBER

Greater than or equal to Check Number

Less than or equal to Check Number

BY AMOUNT

Greater than or equal to \$0.00

Less than or equal to \$0.00

BY DATE

Start date MM/DD/YYYY

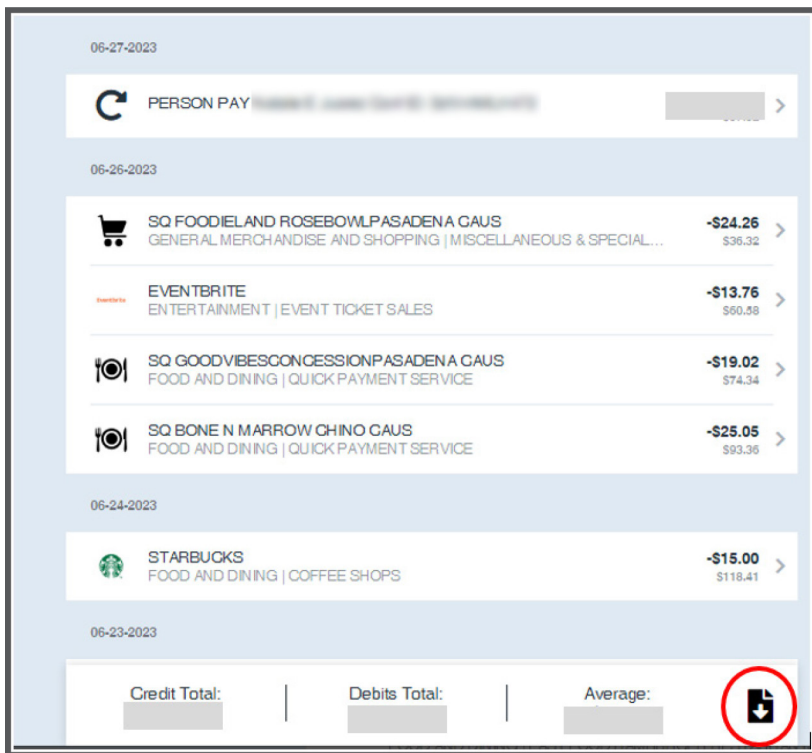
End date MM/DD/YYYY

The maximum date range for search is 1 year. If no date range is specified the search defaults to a year

APPLY

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** and **qbo**. Choose 1 to download.