



Connecting your bank to QuickBooks and creating banking rules



Introduction

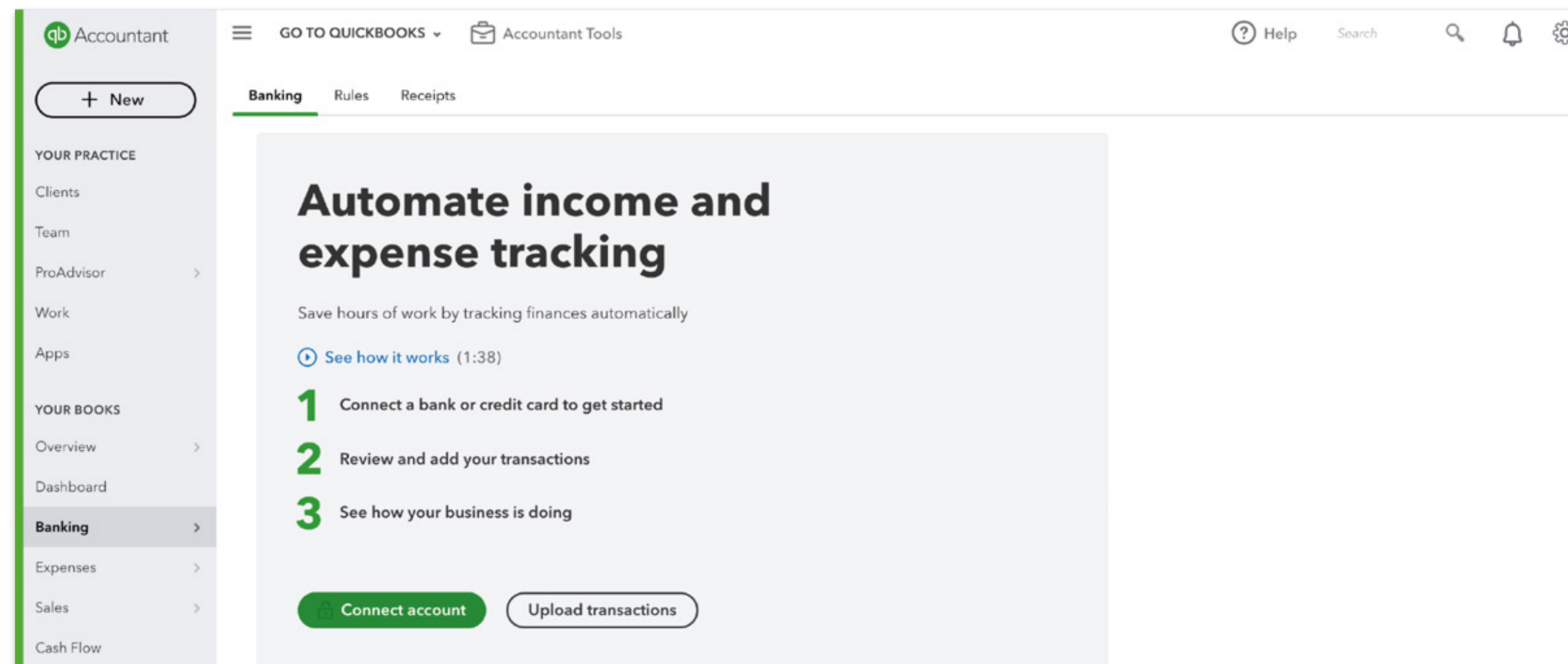
Get the full picture of your business finances. Connect your banks and credit cards to QuickBooks for a complete, real-time view of all your finances and cash flow. Save time with reliable data that shows you where you stand.

- Fast, easy and secure set-up in less than one minute
- See all your business finances in one place
- Save time and hassle with synchronised solutions
- Manage your cash flow with real-time data and forecasting

How to connect your bank

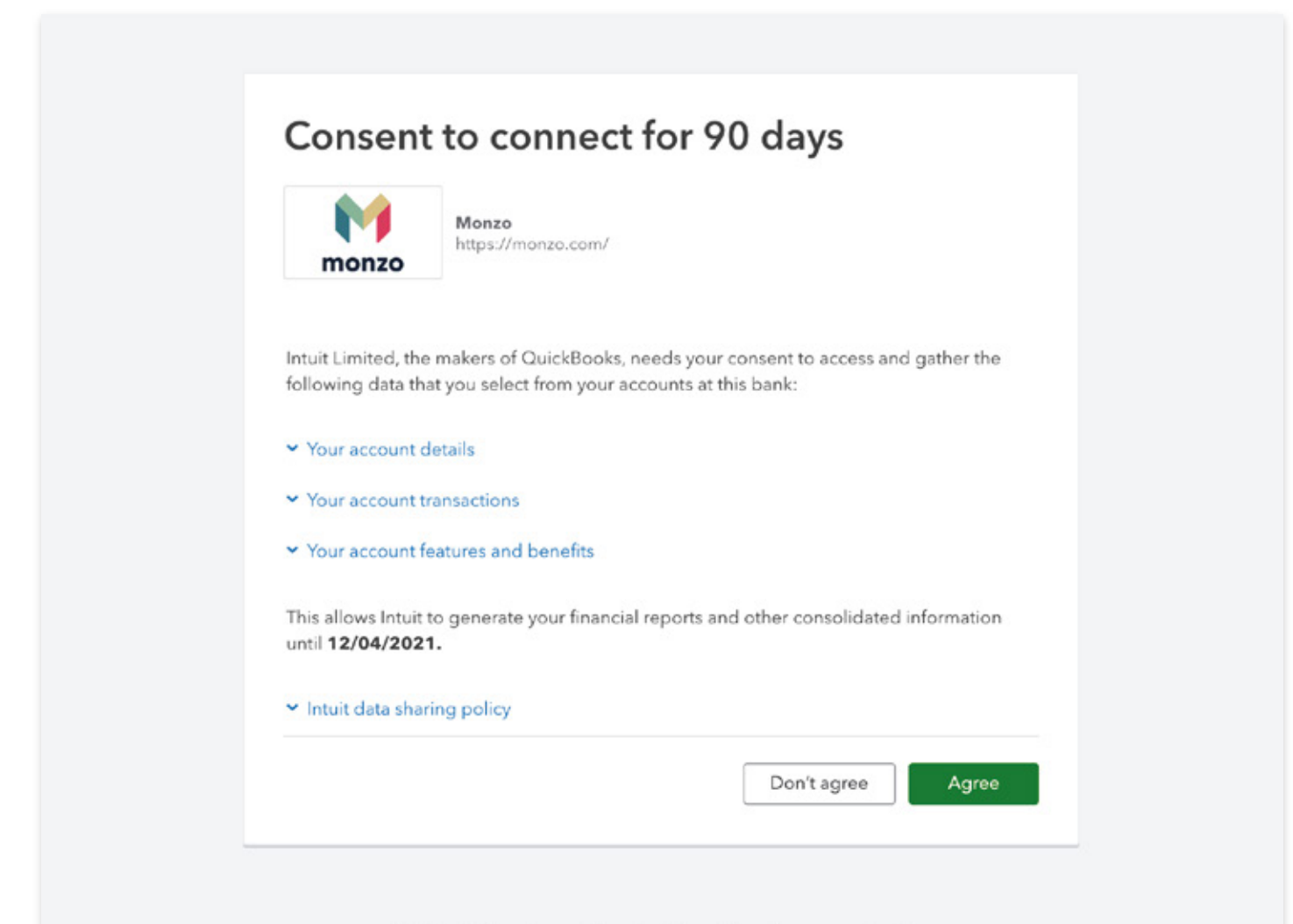
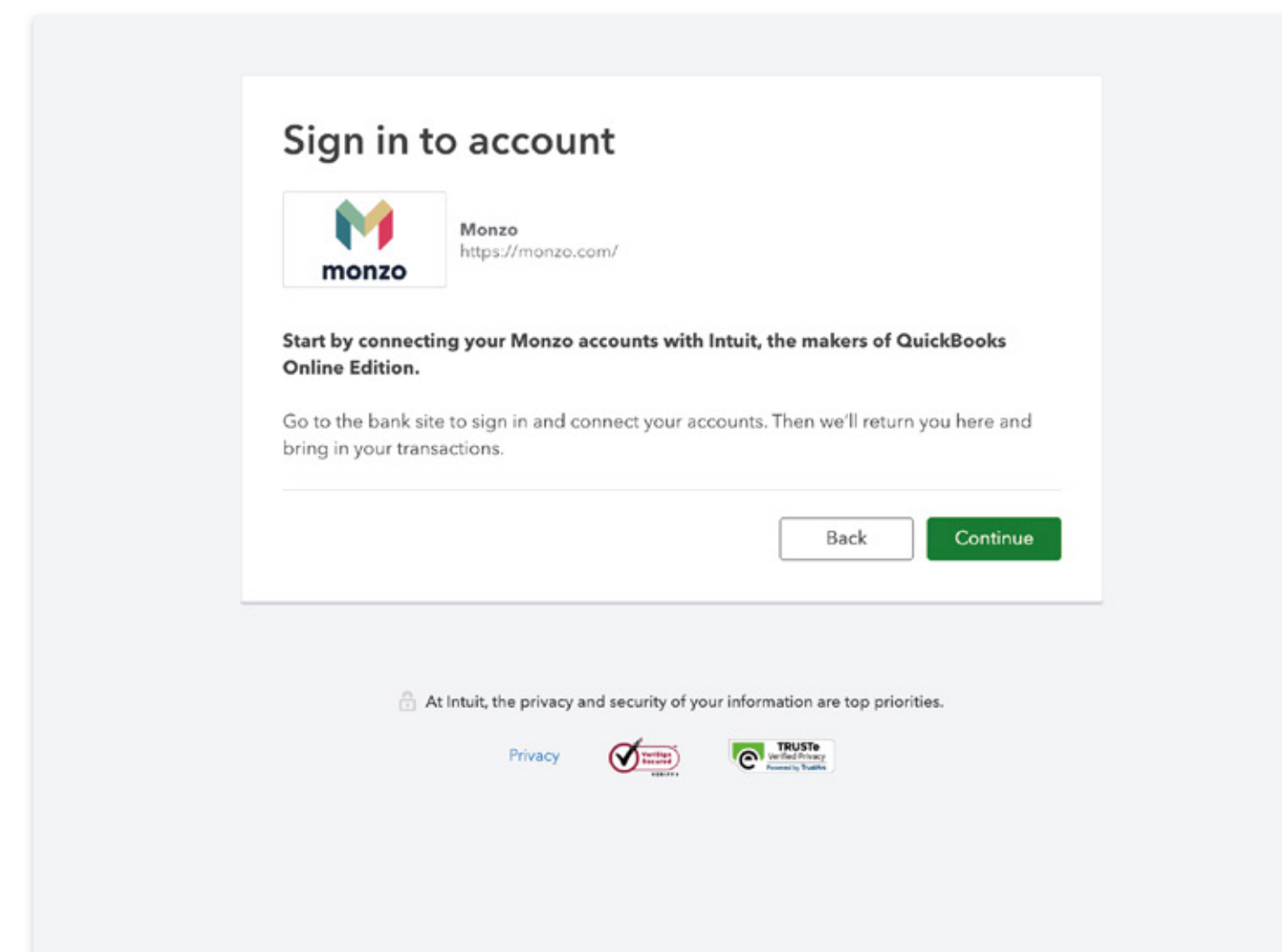
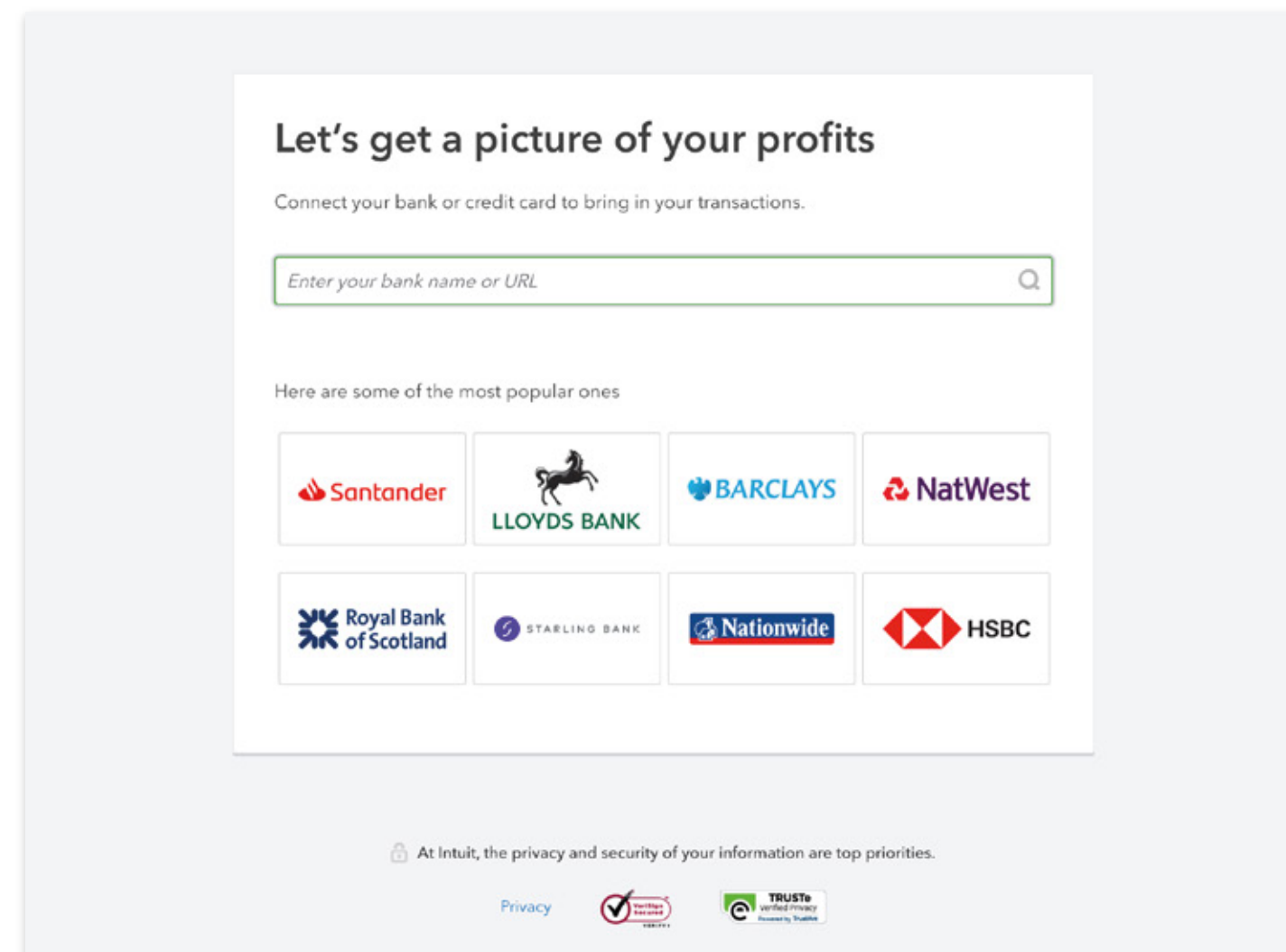
Go to **Banking** on the left pane, then select **Banking** at the top.

Select **Connect** from the landing page, or select **Add Account** if you've connected previously.



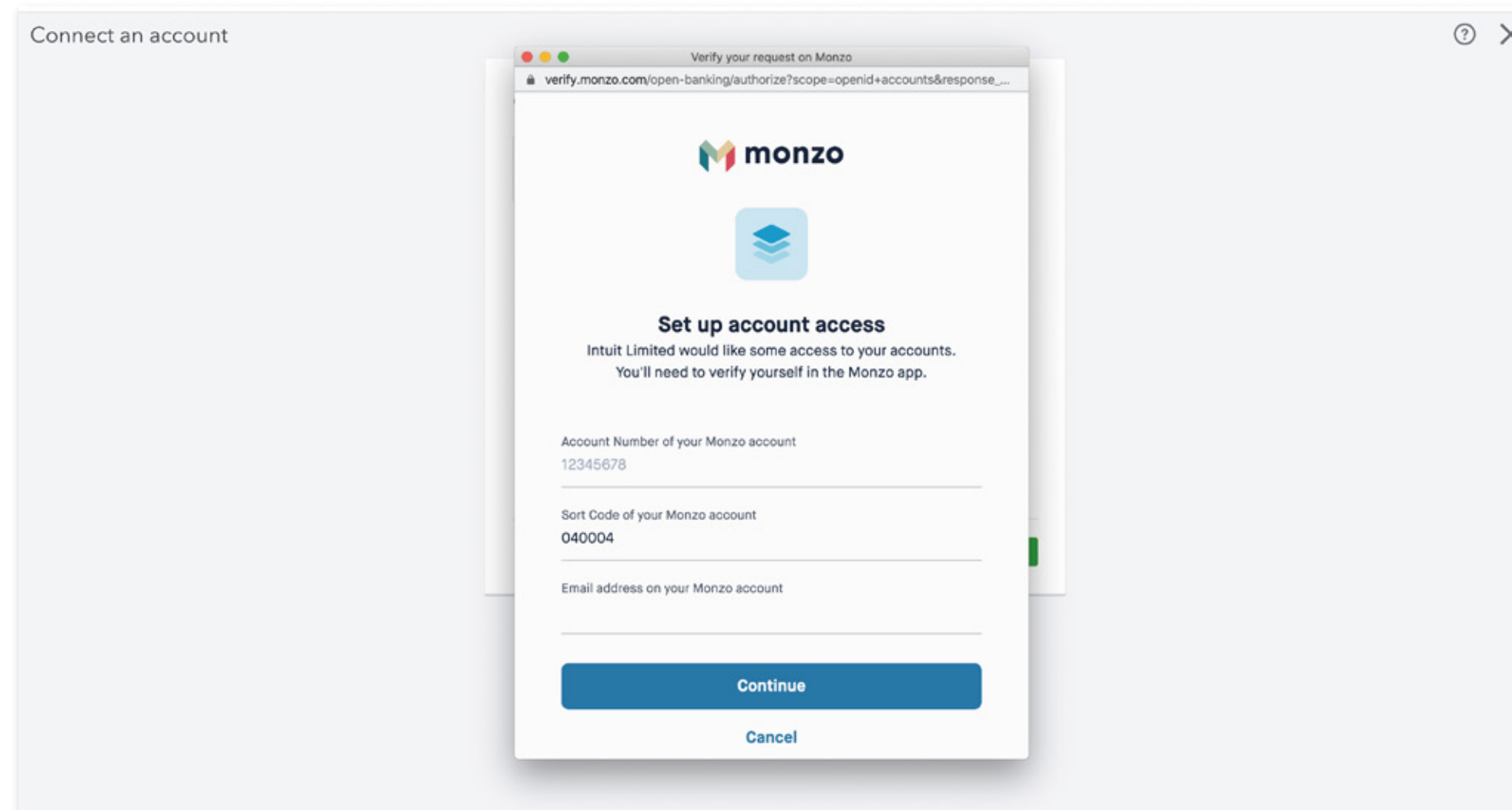
How to connect your bank

Search for your bank and select **Continue**; read the terms and click **Agree**



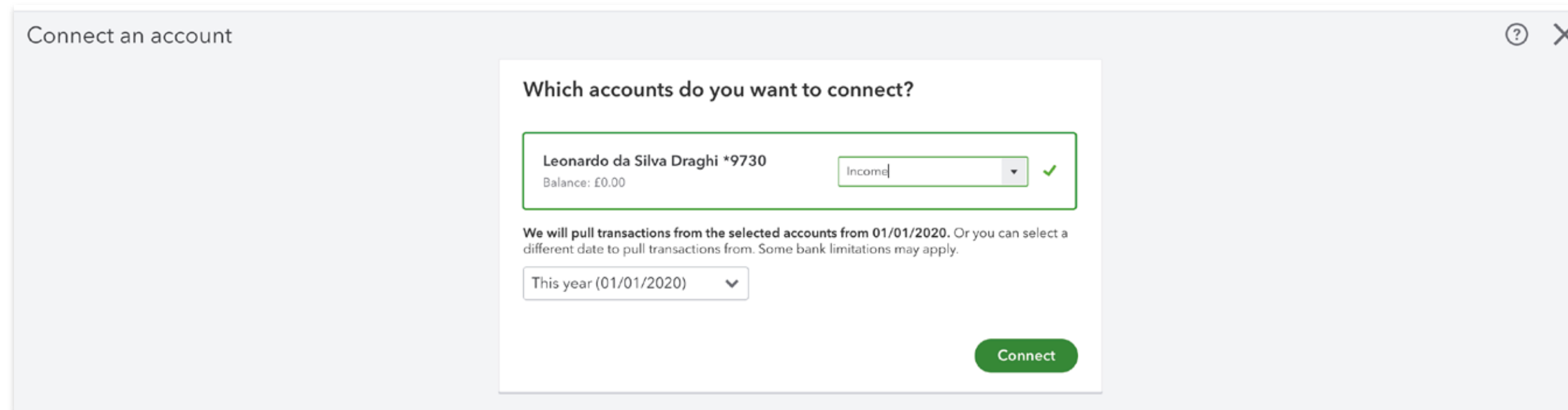
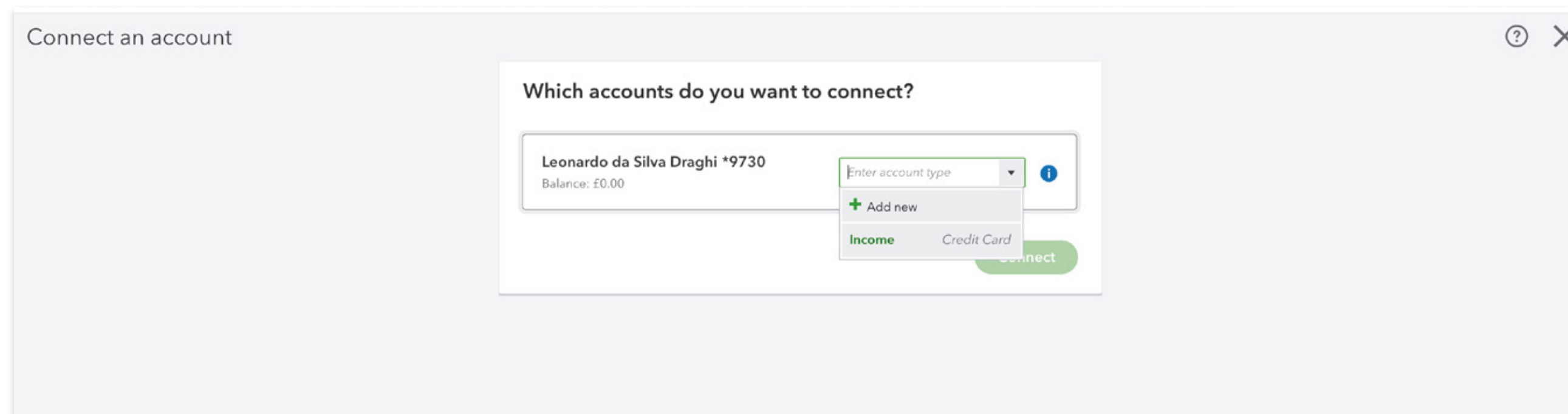
How to connect your bank

Follow the steps on your bank's internet banking page to authorise QuickBooks to connect to your bank account. Once you have authorised the connection, you'll automatically be taken back to QuickBooks.



How to connect your bank

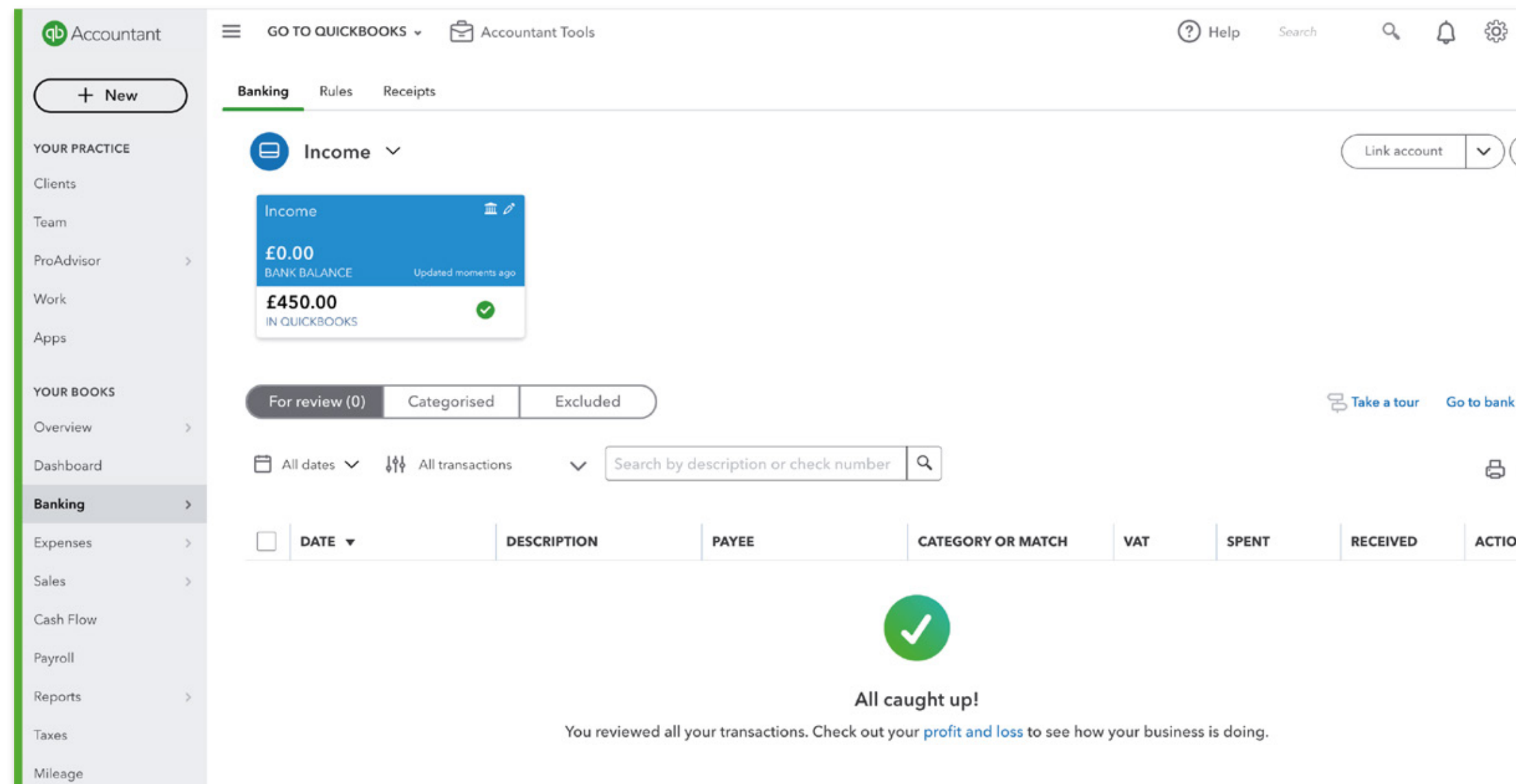
In QuickBooks, select the bank accounts you want to connect and which account they will link to in QuickBooks.



How to connect your bank

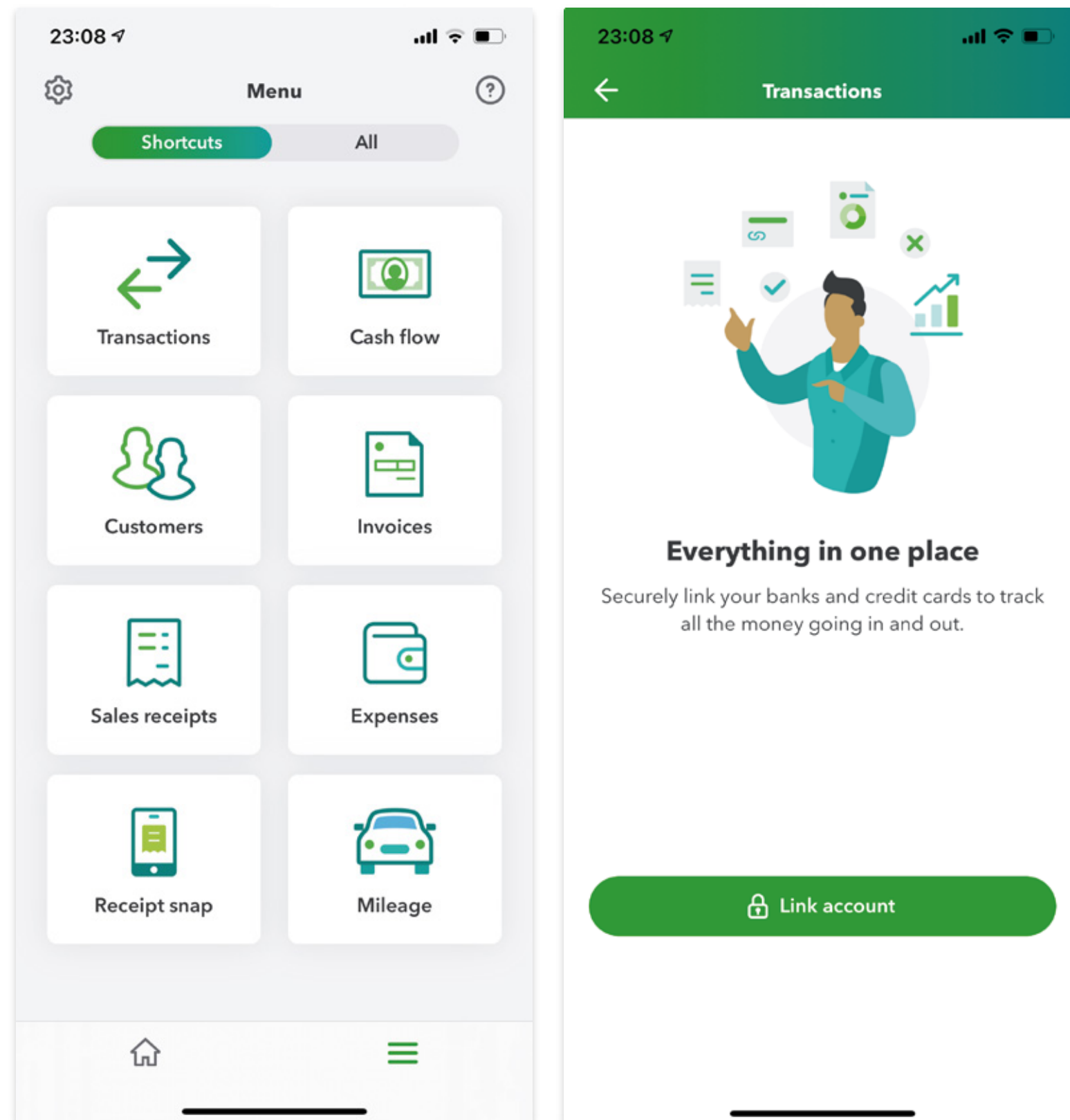
Select **Connect**.

QuickBooks is now connected to your selected bank account(s), and your transactions can be found in the Banking page.



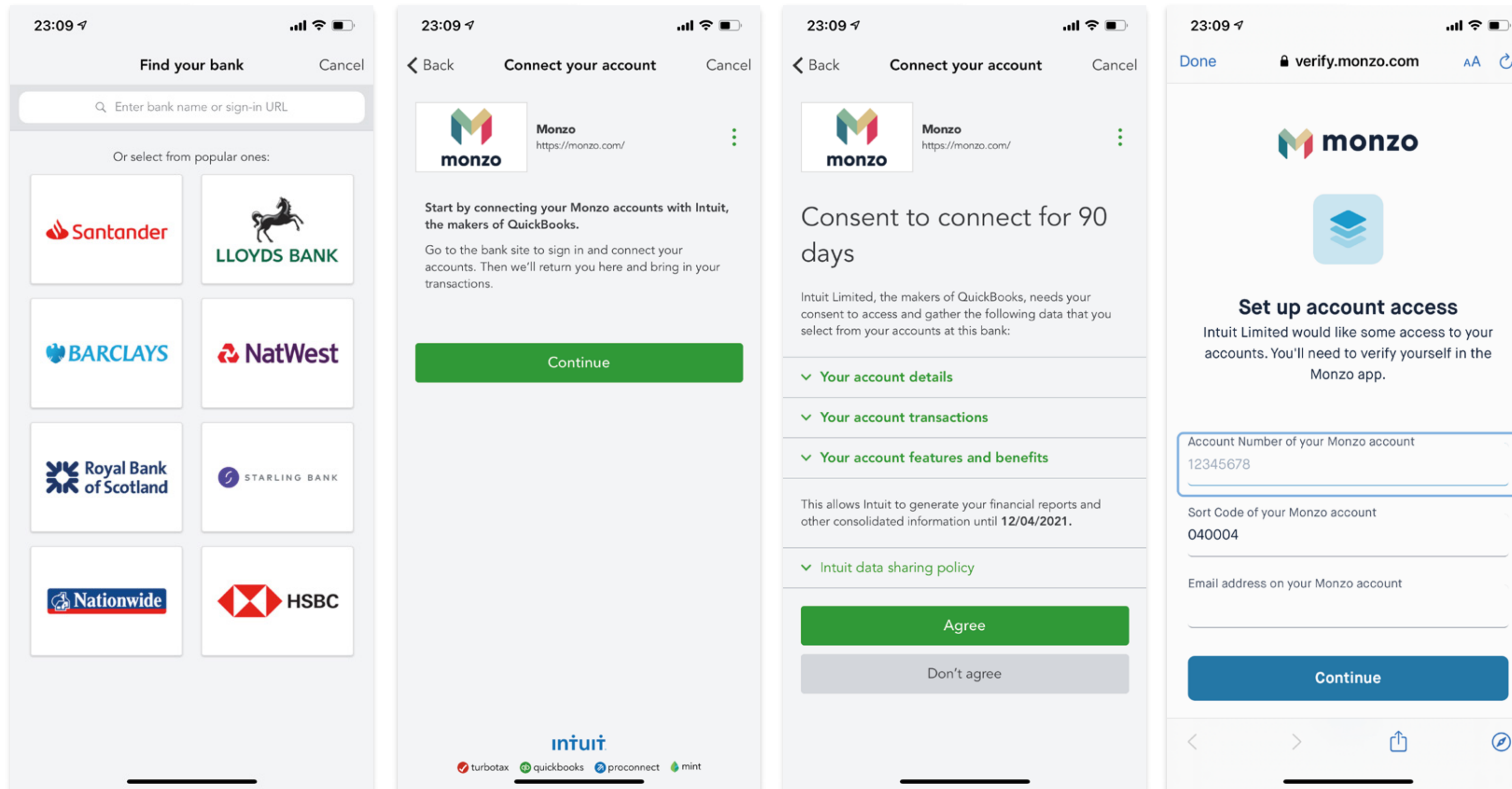
How to connect your bank through the mobile app

Select **Transactions** and click on **Link account**.



How to connect your bank through the mobile app

Choose your bank from the menu and follow the onscreen instructions.



How to create a bank rule

When you download transactions from your bank, you need to categorise them so they go to the right accounts. You can create bank rules that speed up this review process by automatically categorising transactions for you.

The more your rules are applied, the more accurate the automatic categorisation gets. After a while, QuickBooks will be able to sort through transactions and add details like payees.

- Go to the Banking menu or Transactions menu. Select the Rules tab.
- Select **New rule**.
- Enter a name in the **Rule** field.
- Select **Money in** or **Money out**.
- Select the bank or credit card account.
- Set the rule conditions. Decide the transaction must meet All or Any of the conditions. You can add up to 5 conditions.

- In the Conditions fields, specify if the rule applies to Bank text, description or amount. Select **Contains**, **Doesn't contain** or **Is exactly** to decide how QuickBooks applies the rules.

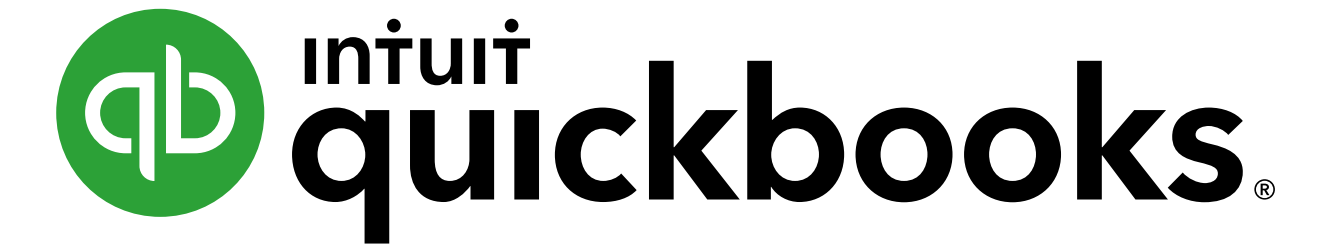
- Select the settings for the rule. Select the **Transaction type**, **Payee** and the **Category** to apply.

- **Save**.

You can also create a rule directly from the banking section, by selecting the transaction and clicking on Create rule from this transaction

We recommend starting with easy, consistent transactions that are easy to recognise, such as petrol.

Thank you



For further help, contact your accountant or our free support line on

0808 168 8175 8AM - 7PM Monday to Friday

or contact a **QuickBooks expert** using chat messaging by clicking the **Help** button in QuickBooks
8AM - 10PM Monday to Friday | 8AM - 6PM Saturday and Sunday