Bell Bank

Member FDIC

How to
Disconnect Your Old Login from QuickBooks

Here's how to disconnect your old login, so it no longer feeds transaction information into your QuickBooks Online:

(Be sure to back up your transactions in QuickBooks prior to disconnecting. This step is critical to protect you from any mishaps such as duplicate transactions, which might mean you need to start over.)

1. Go to the Banking menu and select the Banking tab.
2. Tap the tile for the bank account.
3. Click on the pencil icon, then select "Edit account info."
4. Press "Disconnect this account" on the Save checkbox. (Note: If QuickBooks is downloading new transactions, you won't see this option. Wait a few minutes for the update to finish and try again.)
5. Hit "Save and Close." Please see the next page for instructions on how to reconnect your QuickBooks to your new username.

Bell Bank

How to
Reconnect Your New Login to QuickBooks

Member FDIC

Connect Your New Login to QuickBooks

Here's how you will connect your new login to feed transaction information into your QuickBooks Online:

Step 1: Connect a bank or credit card account

You can connect as many accounts as you need. Feel free to connect accounts you use for both business and personal, but you'll need to sort out personal transactions as you go.

1. Go to the Banking menu or Transactions menu.
2. Select the Banking tab.
3. Select "Connect Account" on the landing page if this is your first time connecting. Or select "Add account" or "Link account" if you've already created one.
4. Search for Bell Bank.
5. Select "Continue" and enter the new username and password you use for Bell Bank.
6. Follow the onscreen steps to connect. Bell Bank requires additional security checks to connect your accounts. It may take a few minutes to connect.
7. Select the bank accounts (savings, checking, or loans) you want to connect. You should see all your available Bell accounts displayed, with the exception of any mortgage accounts you have in your online banking.
8. For each account you connect, select the matching account type from the dropdowns. These are accounts on your chart of accounts in QuickBooks.
9. Select how far back you want to download transactions. Bell Bank will let you download the last 18 months of transactions.
10. Hit "Save and Close."

Step 2: Download recent transactions

Now your accounts are connected. QuickBooks automatically downloads transactions, so you don't have to enter them manually. To refresh and get the latest transactions:

1. Go to the Banking menu or the Transactions menu.
2. Select the Banking tab.
3. Select "Update."

Bell Bank

How to
Reconnect Your New Login to QuickBooks

Member FDIC

Step 3: Review and categorize downloaded transactions

1. Go to the Banking menu or the Transactions menu.
2. Select the tile for the account you want to review.
3. Select the “For Review” tab to start your review.

QuickBooks sends downloaded transactions to the For Review tab. Review them one by one. For each, you have the option to match, add, or view multiple matches.

Step 4: Review matched or added transactions

After you match or add downloaded transactions, they’re recorded into QuickBooks. You can review your work and make sure everything is correct in the Categorized or Reviewed tab. It’s a good idea to quickly check this after your review:

1. Go to the Banking menu or the Transactions menu.
2. Select the tile for the account you want to review.
3. Go to the Categorized or Reviewed tab.
4. Select the link in the Added or Matched column to review the transaction.

Extra: Update your connected accounts

If you need to update Bell Bank info such as your username or password, or refresh the connection, please follow the steps below:

1. Go to the Banking menu or the Transactions menu.
2. Select the Banking tab.
3. Select the Edit icon in the tile for the bank account you want to update.
4. Select “Edit sign-in info.”
5. Update your account info.
6. Select “Save and connect.”