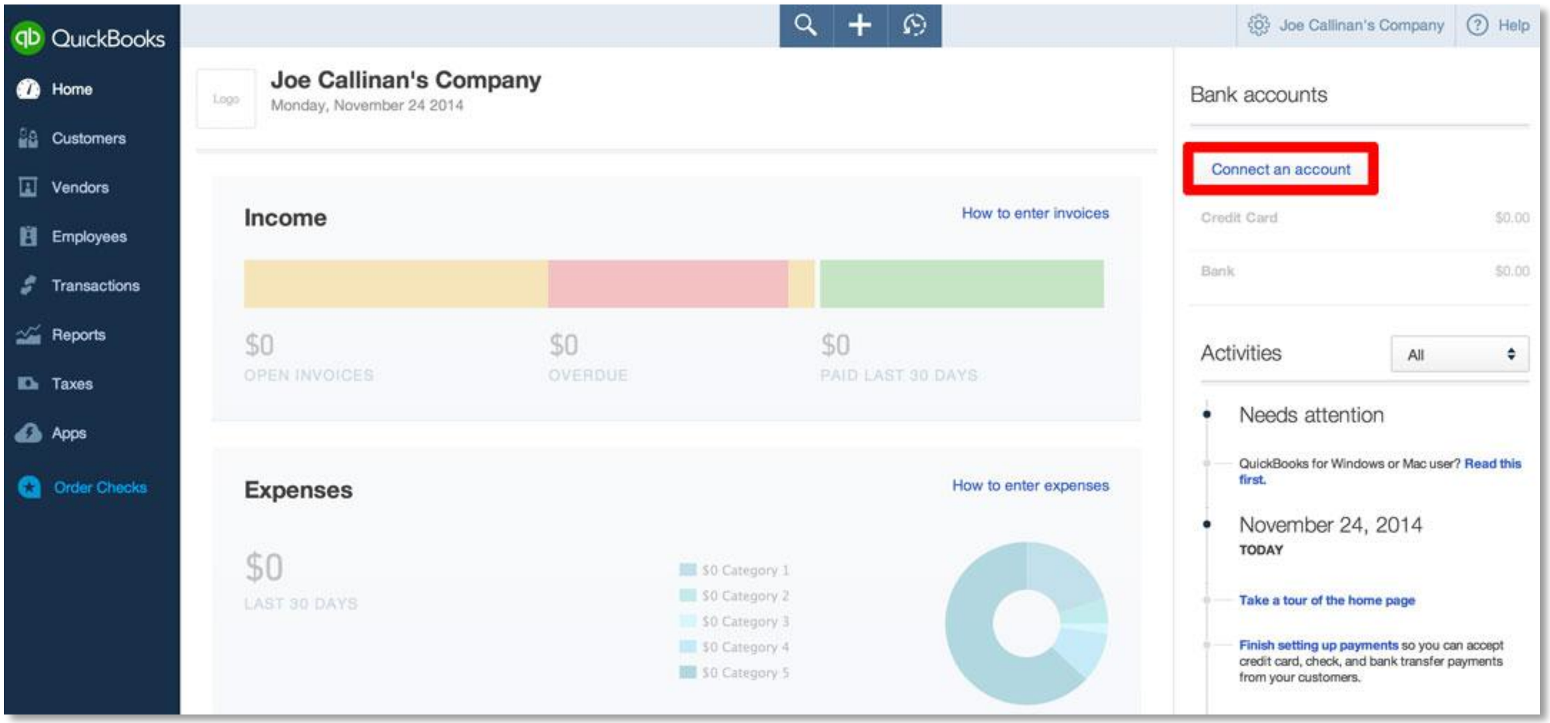
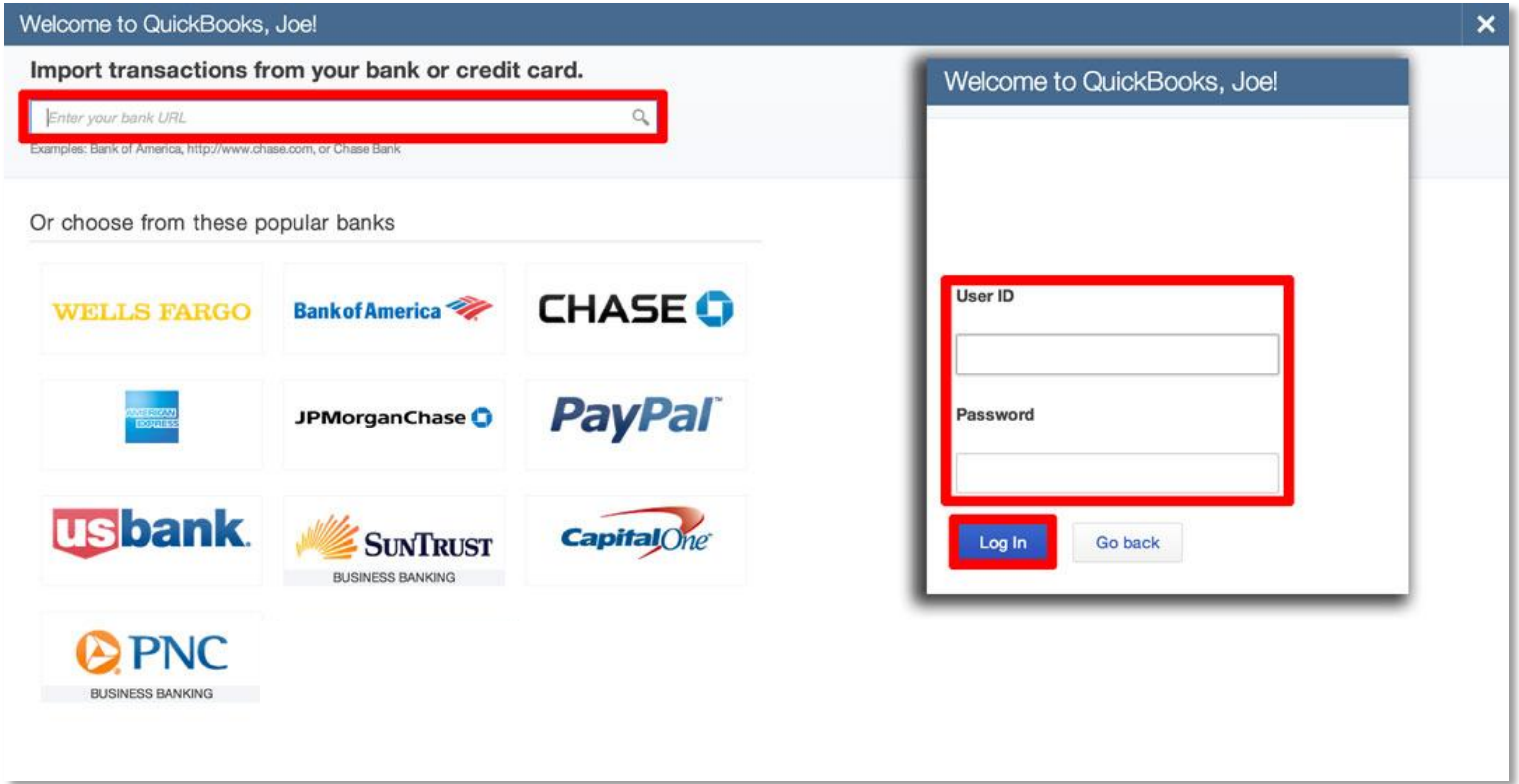
CONNECT YOUR ACCOUNT TO QUICKBOOKS ONLINE

1. Connect Your Bank Account

On the **Homepage**, under **Bank Accounts** click **Connect an Account**.

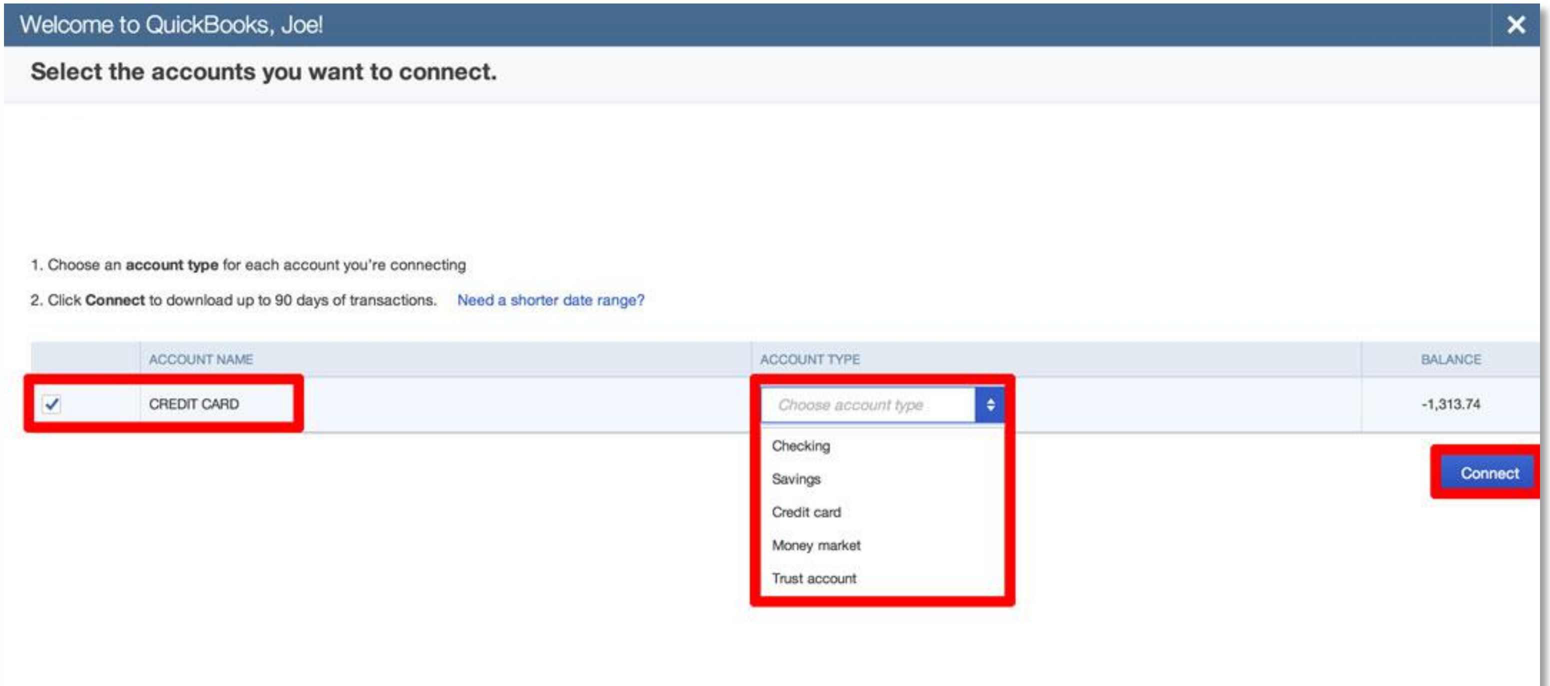


Type **Lowry State Bank** in the input box and the username and password you use to access your accounts. Click **Log In**. Answer the security question(s) on your account.



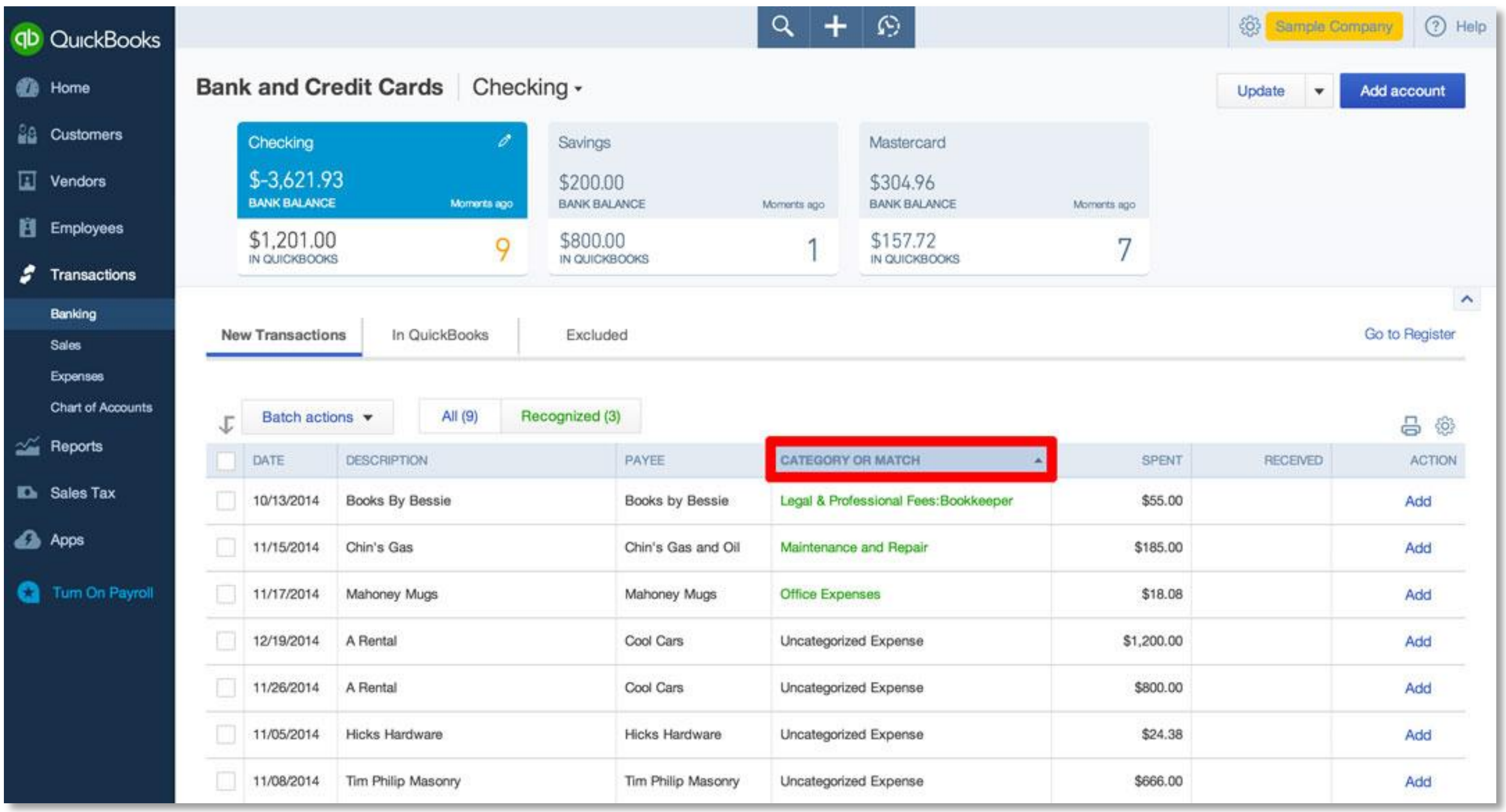
2. Choose Your Account

Once connected, you will see all of the accounts you have at this bank. Choose the account you use for your business and tell QuickBooks what kind of accounts they are. QuickBooks will download all of the transactions from the last 90 days, but they aren't in QuickBooks just yet.



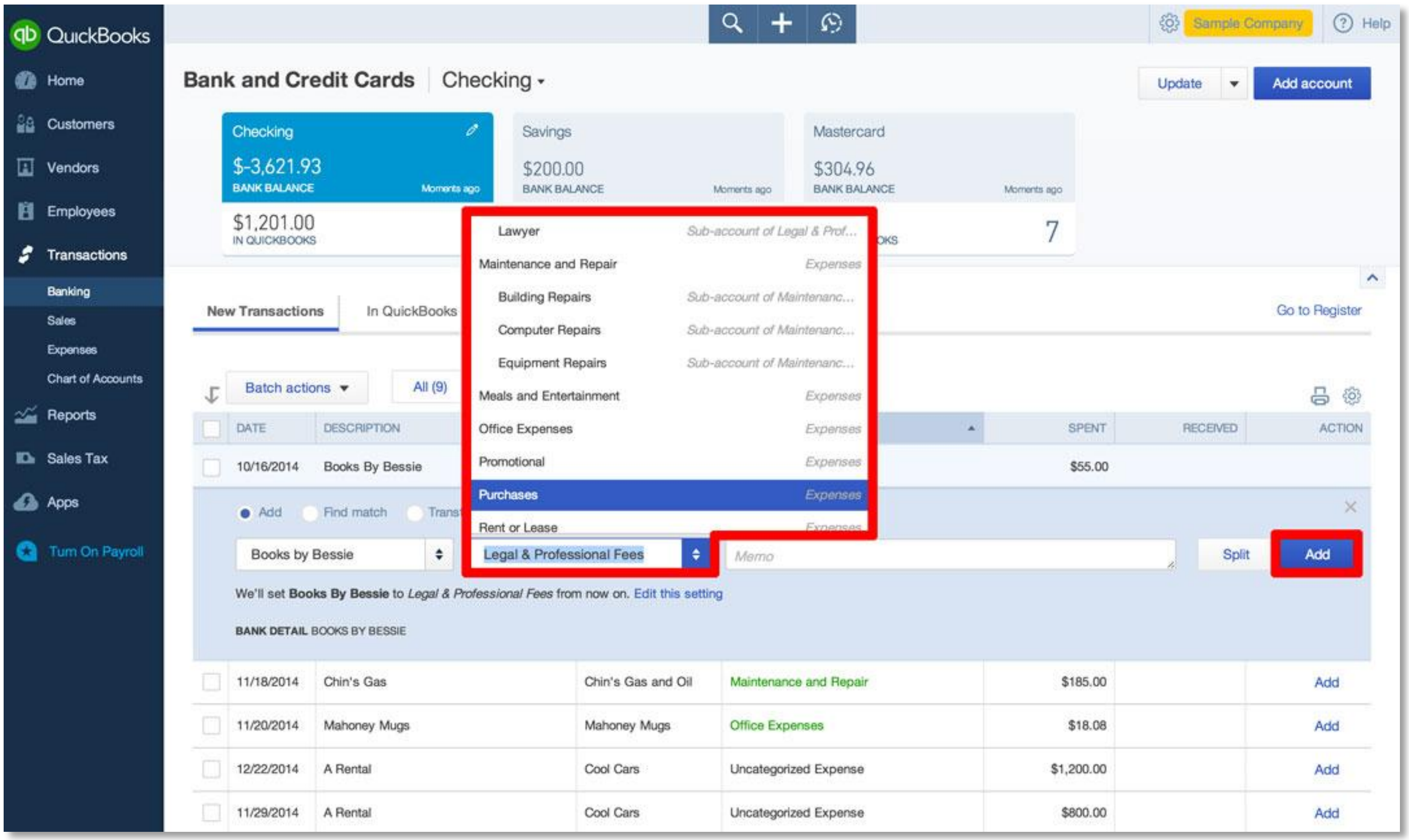
3. Entering Transactions

On the Bank and Credit Cards page, click on the **Category or Match** column to sort the transactions. You will see where QuickBooks tried to find categories for some transactions.



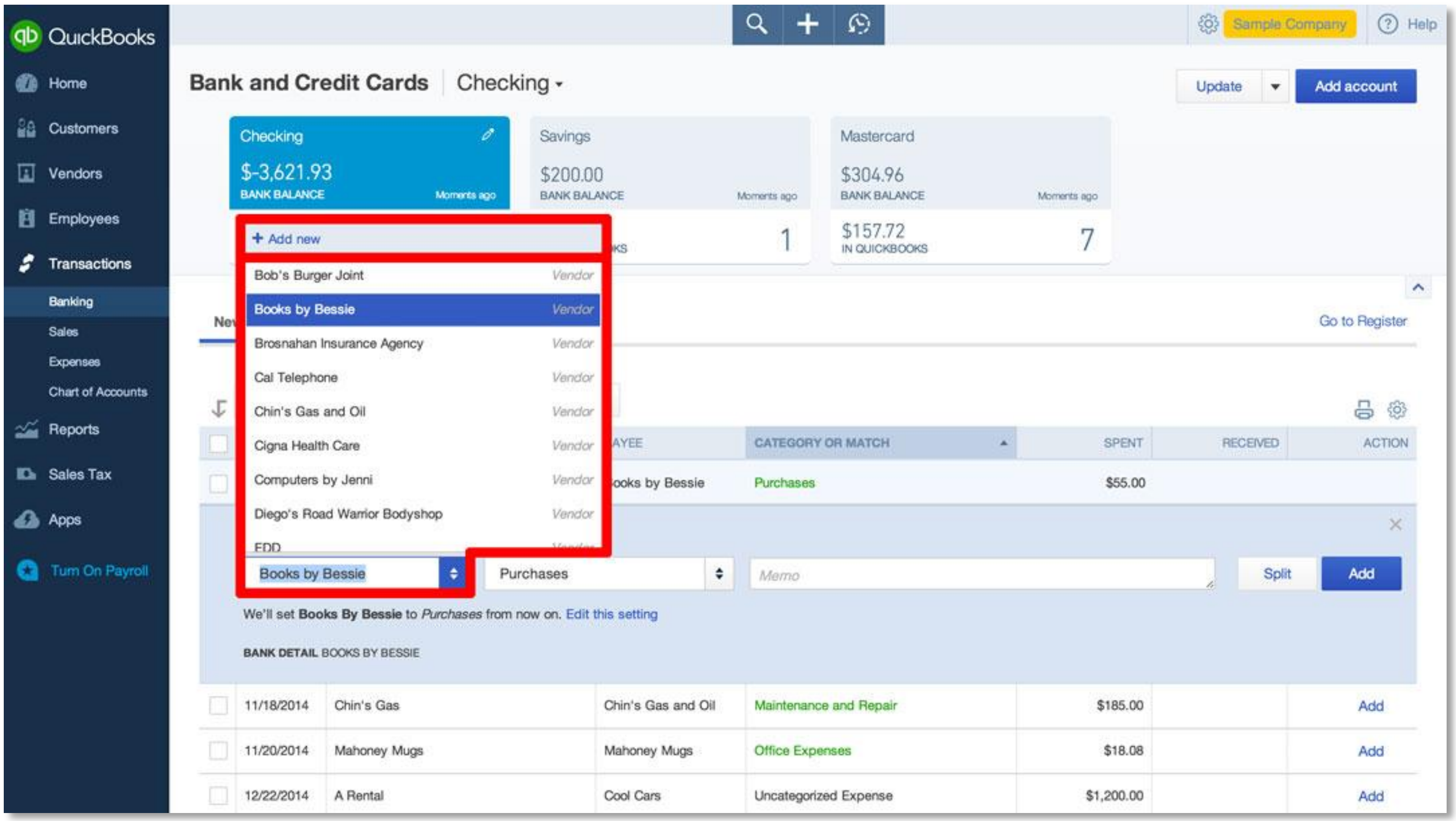
4. Changing Transaction Category

To put this transaction in a different category, open the transaction menu and choose the right one. If this is a new transaction, click **Add** on the column to the right.



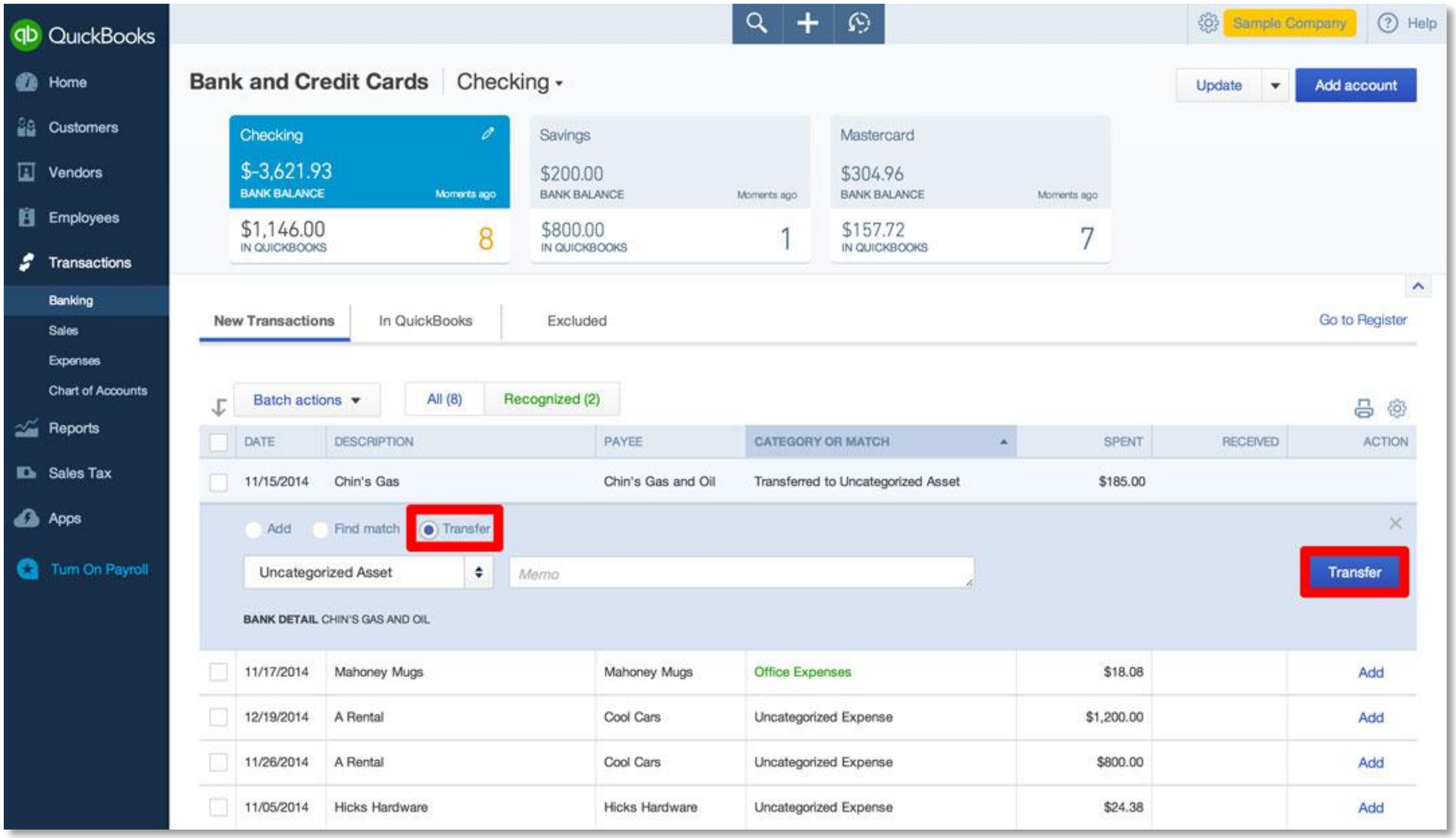
5. Choose a Payee

Select **Payee.** If this is a new payee, click **Add**.



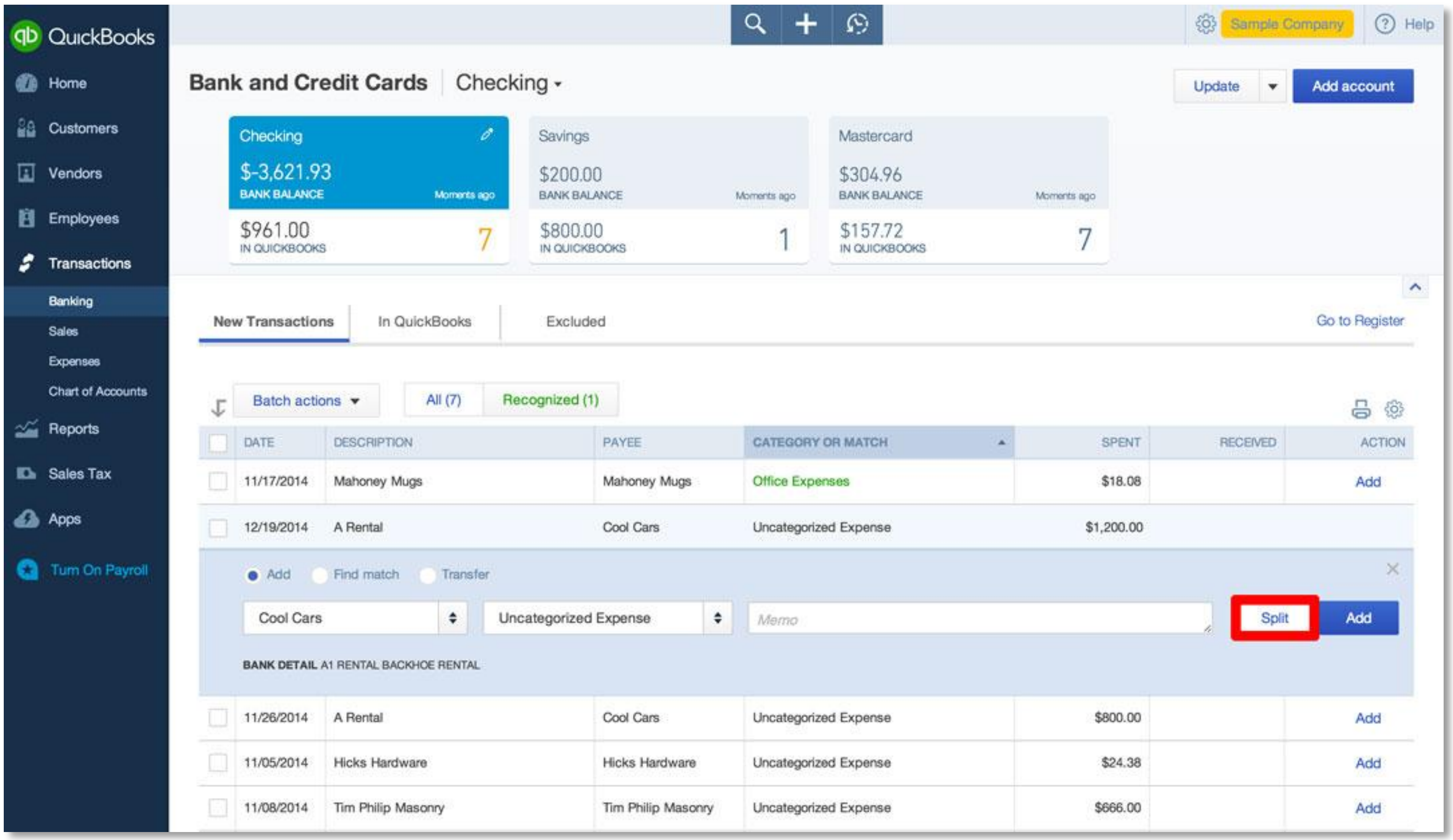
6. Transfer

If you paid a business credit card bill or made a loan payment with a transaction, open the transaction and choose **Transfer**.



7. Split

If you purchased items from different categories with a single transaction, choose**Split**.



This will open the Split Transaction window, where you can choose the appropriate categories and how much you spent on each.