QUICKBOOKS FOR BUSINESS ONLINE

Connecting your Unity Bank account with QuickBooks

EXPERIENCE COMMUNITY

UNITY BANK

www.unitybanking.com

Member FDIC

EQUAL HOUSING LENDER

REV 9/3/24

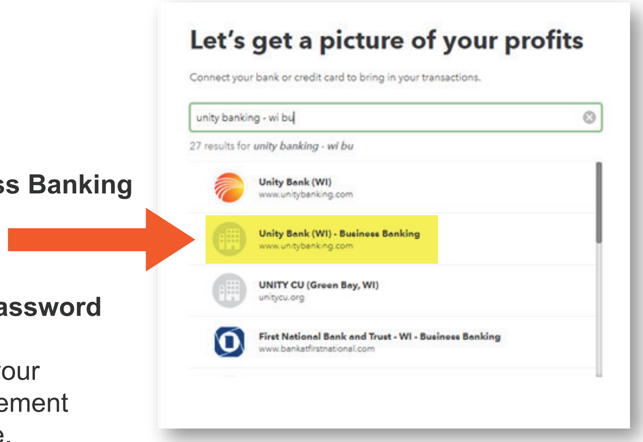
CONNECTING YOUR BANK ACCOUNT WITH QUICKBOOKS

A seamless approach to financial management.

As an entrepreneur, your focus should be on growing your business, not managing it. Integrating your bank account with QuickBooks simplifies your financial management, providing a convenient way to oversee your accounts anytime, anywhere. When you connect your Unity Bank Online Banking in QuickBooks, the transactions automatically download and categorize. This helps you to save time in updating your bank feeds. Allowing you to conveniently review and approve them. This guide will help you connect your bank account to QuickBooks, giving you real-time access to your finances with ease.

CONNECTING UNITY BANK WITH QUICKBOOKS FOR BUSINESS ONLINE BANKING USERS

STEP 1: CONNECT A BANK ACCOUNT



1. Login to your QuickBooks account
2. Go to **Transactions**, then select **Bank Transactions**
3. Select **Link Account**
4. Enter the URL or name of Unity Bank in the **Search** field: www.unitybanking.com, then select **Unity Bank (WI) - Business Banking**
5. Enter your Unity Bank sign in information into the **Login** and **Password** fields, then select **Continue**
   - *Note:* If you use a one-time password or Token to login to your Business Online Banking, please contact our Cash Management department to setup a login specifically for QuickBooks use.
6. Select the account that you want to connect and date to pull transactions from the **dropdown**, then select **Next**
7. Select your account type on the **Account type** dropdown, then select **Next**
   - Note: Choose the account type that matches your chart of accounts in QuickBooks. If you don't see the correct account type, select **+Add new**

STEP 2: DOWNLOAD RECENT TRANSACTIONS

In QuickBooks, refresh your bank feed to automatically download your recent bank transactions

1. Go to **Transactions**, then select **Bank transactions**
2. Select **Update**

STEP 3: CATEGORIZE DOWNLOADED TRANSACTIONS

Review and categorize downloaded transactions to make sure that it is categorized right. This helps you to organize your charts of accounts accurately.

If additional assistance is needed, please contact QuickBooks customer support.