

QuickBooks Self-Employed Connection Methods

Aggregation / Express Web Connect

.csv Import

Set Up Online Banking in QuickBooks Self-Employed

Click Transactions
in the left sidebar



Choose
Connect Account

Enter FI Name
to Filter List



Click FI
Name in List

Follow the
Prompts, and
you're done!

Troubleshooting Data Collection

(By the Numbers)

1. Get the email address associated with the account
2. Write down Error Codes and Messages
3. Document steps customer was following
4. Identify the point where the problem occurs
5. Gather screenshots if possible

Top Support Articles

(Click Title or Link to Open URL)

Import Transactions into QBSE

<http://bit.ly/2b7h0SM>

Common Online Banking Errors

<http://bit.ly/2aHxXz0>

Connect a Bank Account

<http://bit.ly/2bhus6P>

Problems Finding a Bank

<http://bit.ly/2aMzvKZ>

Problems Importing Transactions

<http://bit.ly/2b7hrw4>