QuickBooks Self-Employed Troubleshooting

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Troubleshooting Introduction

Normally, QuickBooks Self-Employed connectivity troubleshooting is just a matter of confirming that the banking connectivity is set up properly.

IMPORTANT:	DO NOT instruct the customer to clear cookies for banking errors.
IMPORTANT:	DO NOT Delete the account during troubleshooting unless end user does not need any transactions previously downloaded from that account.

Follow These Steps First

If the Account is Not Connected

1. Click Transactions in the left sidebar, then choose Connect Account (or Add Account).
2. Enter the name of the financial institution, then click the search icon.
3. Click the link for the bank that matches their account.
4. Enter the sign-in credentials for the institution and click Connect Securely.

NOTE:	When you connect QuickBooks Self Employed to a bank, you typically use the primary user's login credentials for the bank's online banking services.

5. If their bank requires extra information, enter it and click Log In.
6. Select the appropriate setting in the Show Account column for each account discovered. This will determine if transactions from each account are shown or not.
7. Click Next. After the connection is complete, click Done.
8. After your download finishes, your transactions will appear on your transactions page.

If the Account is Connected

1. Click the Settings Icon and then choose Bank Accounts.
2. If the sign-in info needs to be updated, you should have an Edit Your Bank Info option under the account with the error.
3. Update your sign-in info and click Connect Securely.
4. If they still can't log in, have the customer copy visit the online banking site for the institution directly and manually enter their User Id and password to verify that they are using current and valid credentials.
5. If their bank displays, click the one marked Existing Connection and log in with their credentials and they should be able to see what is already connected.