

GETTING STARTED WITH QUICKBOOKS ONLINE

First Colorado National Bank offers connectivity to QuickBooks Online through [Web Connect](#) or [Linking your Online Banking Account](#).

Web Connect

With Web Connect, you will download a file from the bank's website and upload that file into QuickBooks. This process does not require your online banking credentials to be provided to QuickBooks since the download occurs in First Colorado National Bank's online banking environment.

Download Transactions

- 1) Log into your online banking account at www.firstcoloradobank.com.
- 2) Click on the account of the transactions you'd like to download.
- 3) Click on the arrow with a line underneath (highlighted below).

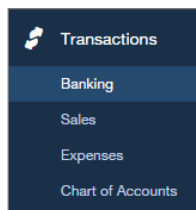


Transactions		↓	🖨	🔍
INTEREST DEPOSIT		+\$0.02		
Dec 31, 2022		\$145.13		

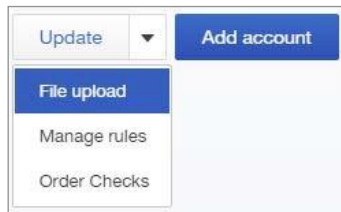
- 4) Select the preferred date range for your download.
- 5) Select QuickBooks (*.QBO) as the file format.
- 6) Save the file to your computer.

Import Transactions to QuickBooks Online

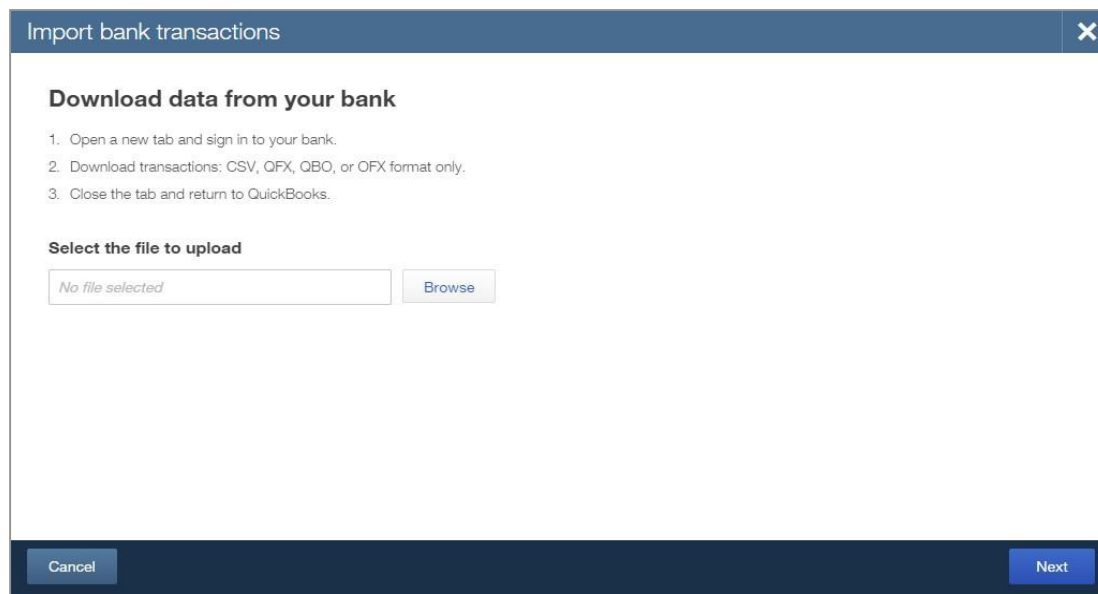
- 1) Open a new browser window and log into QuickBooks Online.
- 2) On the sidebar, click **Transactions > Banking**.



- 3) Click the arrow beside the Update button. From the drop-down menu, select **File upload** and then **Add account**.



- 4) In the Import bank transactions window, click **Browse**. Choose your downloaded Web Connect File, then click **Next**.



- 5) QuickBooks Online will prompt you to either associate an account or add a new account. Choose your preferred option and click **Next**.
- 6) QuickBooks will import the Web Connect file.

Update Transactions

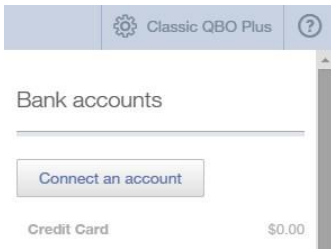
Accounts you set up using a Web Connect file will not update automatically. To update the data in those accounts, simply log into your online banking at www.firstcoloradobank.com, download a current Web Connect file, and import it using the process described above.

Link your Online Banking Account

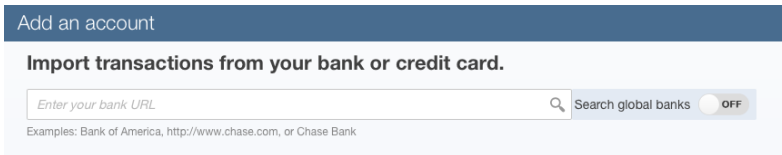
By linking your account, you will authorize QuickBooks Online to automatically download transactions from your financial institution by providing QuickBooks with your online banking credentials.

Link your Account

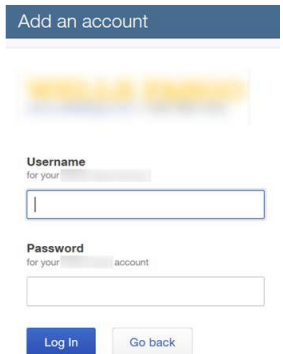
- 1) Open a web browser and log into QuickBooks Online at quickbooks.intuit.com
- 2) In the Home screen in the Bank accounts section, click **Connect an account**.



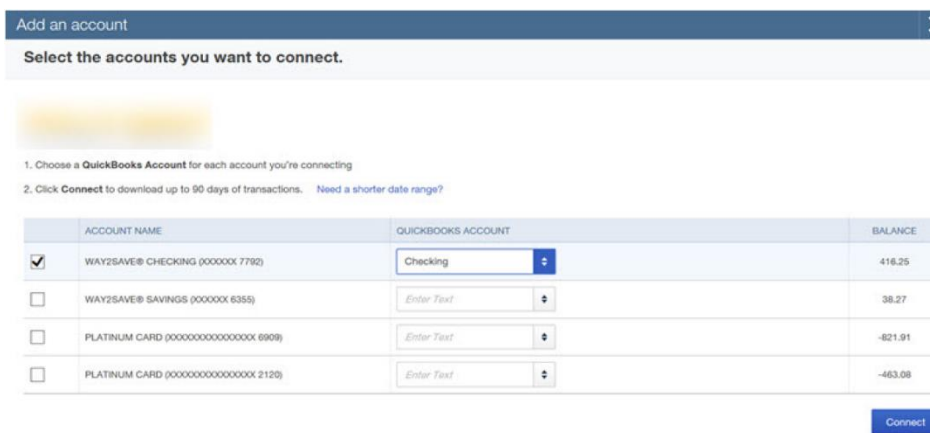
- 3) Enter First Colorado National Bank in the search field, then press return or click the magnifying glass to search.



- 4) QuickBooks Online will display a list with the search results. Select **First Colorado National Bank** from the results list. This will display a login window for First Colorado National Bank.



- 5) Enter the credentials you use to access your FCNB online banking, then click **Log In**. QuickBooks will establish a secure connection and display available accounts.
- 6) Select the accounts you want to include in QuickBooks Online and assign them an account type.



- 7) Click **Connect** to complete the account set-up.

Update Transactions

QuickBooks Online automatically updates your linked bank account data when you log into your QuickBooks Online account. If you are in mid-session, you can use this process to refresh your data:

- 1) On the sidebar, click **Transactions > Banking**.
- 2) Click **Update** to refresh your accounts.



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