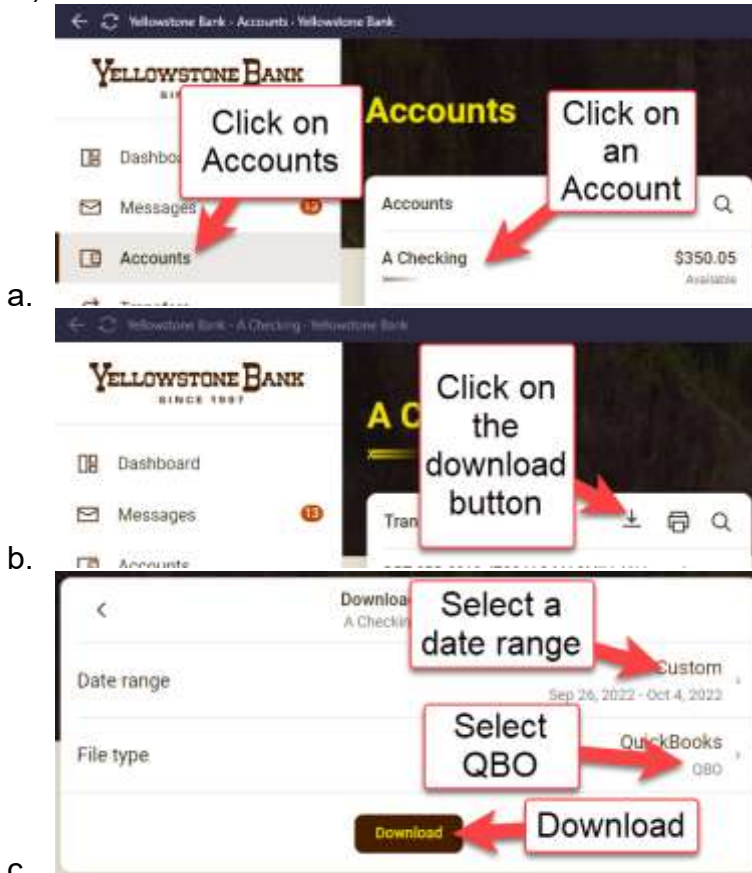


QuickBooks Online QBO Upload

To manually upload transaction into QuickBooks Online, please follow the instructions below:

1. Log in to <https://www.yellowstone.bank> and download your transactions to a QuickBooks (.qbo) file.



c. **Note: Take note of your last successful download.** Duplicate transactions can occur if you have overlapping transaction dates in the new transaction download.

2. Login to **QuickBooks Online**
 - a. Go to **Bookkeeping** then **Transactions** then select **Bank transactions**
 - b. If the account is already in QuickBooks
 - i. select the blue tile for the account you want to upload the transactions into.
 - ii. Select the **Link account ▼** dropdown and then **Upload from file.**
 - iii. Select **Drag and drop** or **select files.** Then select **Continue.**
 - iv. In the **QuickBooks account ▼** dropdown, select the account you want to upload the transactions into. Then select **Continue.**
 - v. Follow the onscreen steps to match the columns on the file with the correct fields in QuickBooks. Then select **Continue.**
 - vi. Select the transactions you would like to import. Then select **Continue.**
 - vii. Select **Yes.**
 - viii. When you accept your transactions, select **Done.**
 - c. If the account is not already in QuickBooks
 - i. select **Upload transactions**
 - ii. Select **Drag and drop** or **select files** and then select the file you downloaded from your bank. Then select **Continue.**

- iii. In the **QuickBooks account ▼** dropdown, select the account you want to upload the transactions into. Then select **Continue**.
 - iv. Follow the onscreen steps to match the columns on the file with the correct fields in QuickBooks. Then select **Continue**.
 - v. Select the transactions you would like to import. Then select **Continue**.
 - vi. Select Yes.
 - vii. When you accept your transactions, select **Done**.
3. Categorize the transactions
 4. Reconcile the transactions
 5. Repeat steps for any additional Yellowstone Bank accounts that need to be uploaded

For additional help, see the QuickBooks Online Support article:

https://quickbooks.intuit.com/learn-support/en-us/help-article/import-transactions/manually-upload-transactions-quickbooks-online/L0rE9OXBz_US_en_US?uid=l9cz1adx

Contact QuickBooks Online Support at <https://quickbooks.intuit.com/global/support/>