



QuickBooks User Guide

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QuickBooks Online

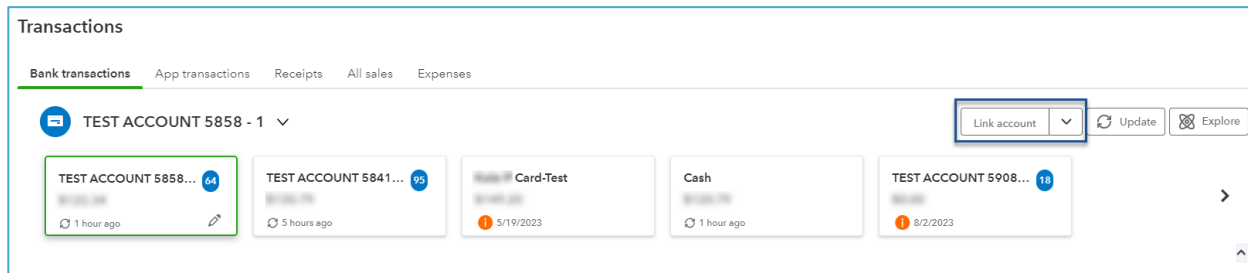
Express Web Connect

From your menu bar - Click on **Banking**.

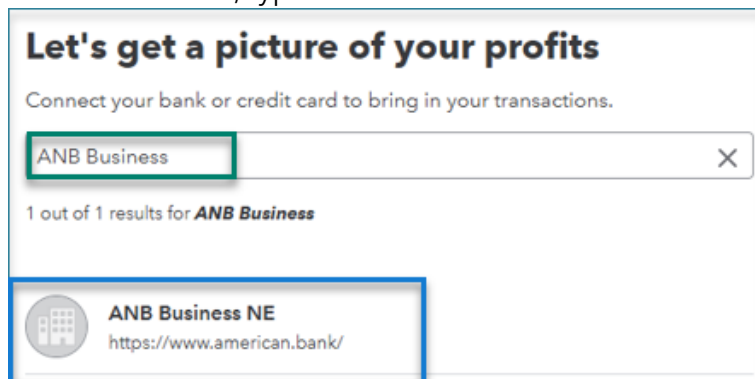
Note: Depending on your role, your access may look different.

Link a new Account.

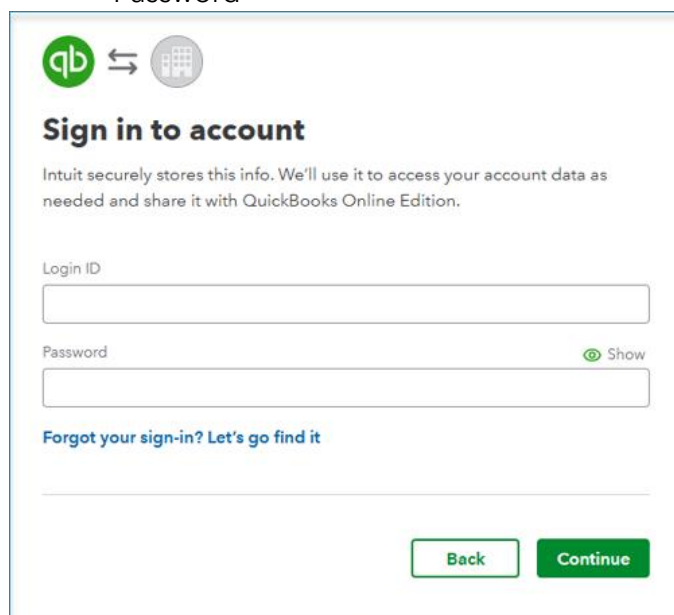
1. Click On **Link Account**.



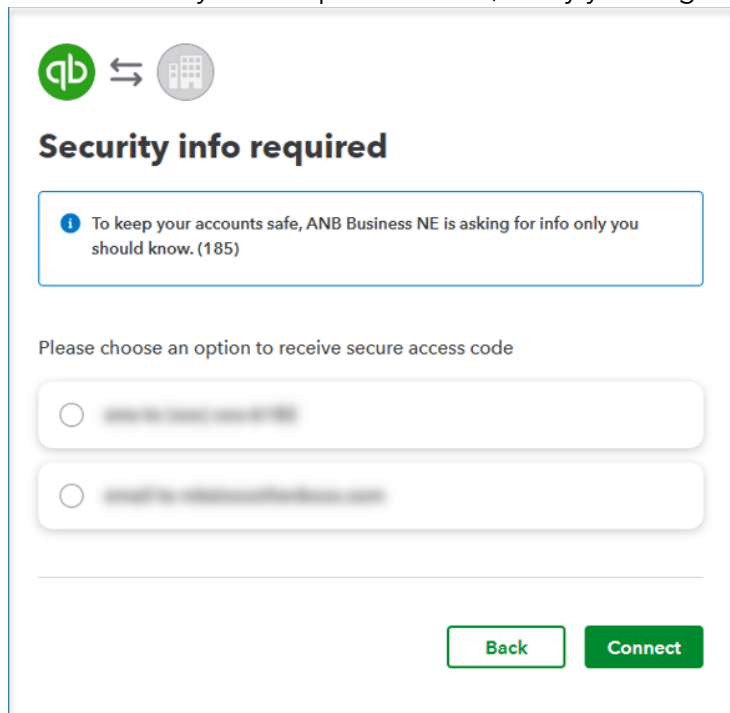
2. In the search bar, type in **ANB Business NE**.



3. Locate ANB using the URL: **https://www.american.bank/**
4. Sign into account using your ANB Go Business login information.
 - Login ID
 - Password



5. Click **Continue**.
6. On the Security info required screen, verify your login by receiving a secure access code.



Security info required

To keep your accounts safe, ANB Business NE is asking for info only you should know. (185)

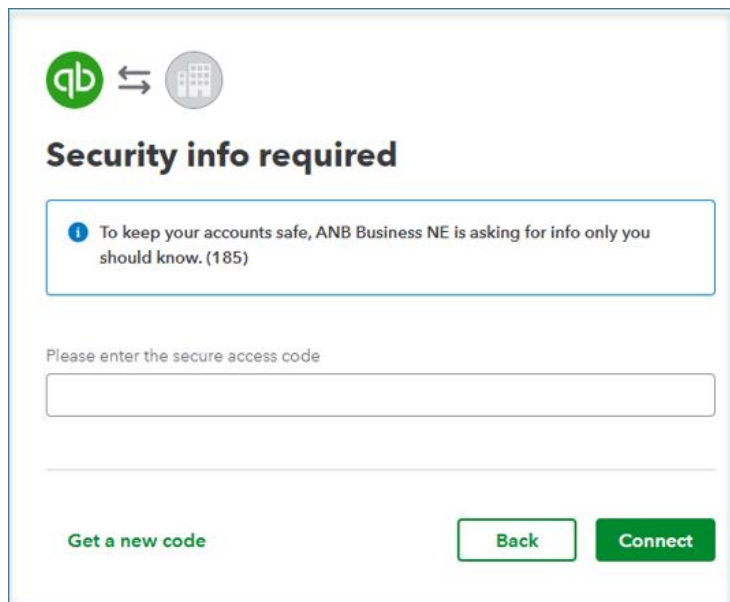
Please choose an option to receive secure access code

☐ Send to my mobile phone

☐ Send to my email address

[Back](#) [Connect](#)

7. Once you receive the secure access code, enter the code in the box.
8. Click **Connect**.



Security info required

To keep your accounts safe, ANB Business NE is asking for info only you should know. (185)

Please enter the secure access code

[Get a new code](#) [Back](#) [Connect](#)

9. Choose which accounts you want to connect.
10. Select the **Account Type** from the dropdown menu.

Which accounts do you want to connect?

Bank of America Balance: \$123.45 Checking ✓
Bank of America Balance: \$123.45
Bank of America Balance: \$123.45
Bank of America Balance: \$123.45 Savings ✓
Bank of America Balance: \$123.45
Bank of America Balance: \$123.45
Bank of America Balance: \$123.45 Choose account type ⌵ ⓘ

11. In the *Pull Transactions* dropdown, select the timeframe of when to pull the transactions from.

Note: If you already have transactions in QuickBooks, carefully consider the date to avoid duplicate entries.

We will pull transactions from the selected accounts from

1/1/2025

. Or you can select a different date to pull transactions from. Some bank limitations may apply.

This year

⌵

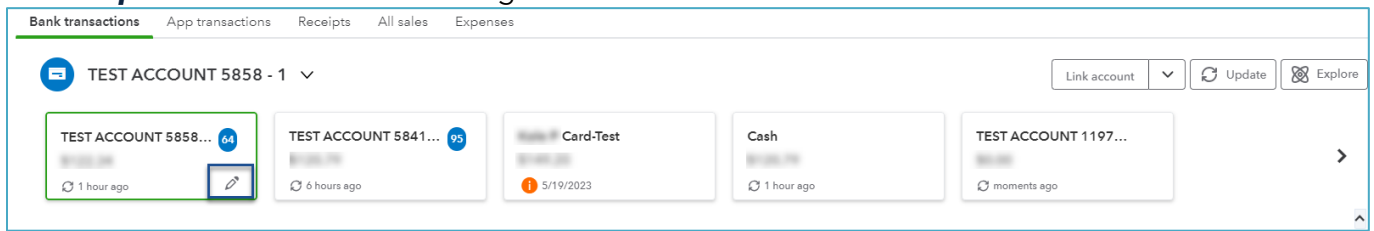
Connect

12. Click **Connect**.

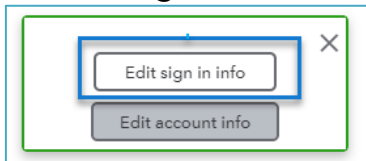
13. Link another account or QuickBooks will provide additional integration options (Remind Me Later).

Updating Accounts already Linked

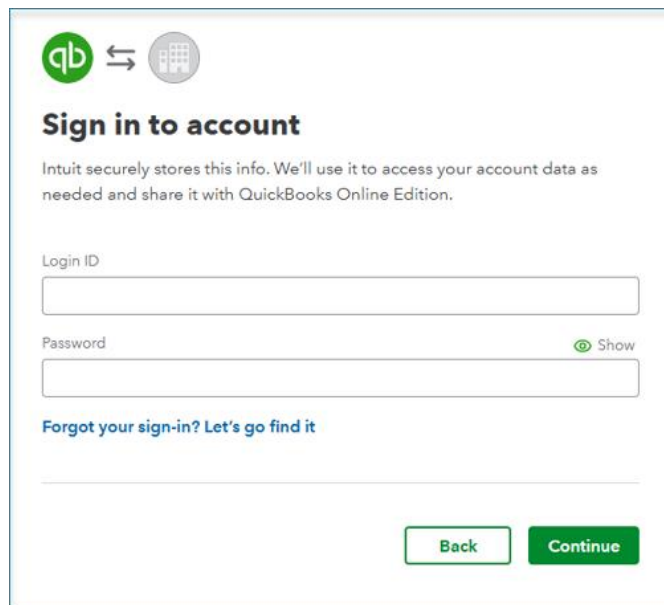
1. Select your account.
2. Click the **pencil icon** on the bottom right-hand corner.



3. Click **Edit sign in info**.



4. Sign in to the account using your ANB Go Business login information.
 - a. Login ID
 - b. Password



5. Click **Continue**.
6. Choose which accounts you want to connect.
7. Select the **Account Type** from the dropdown menu.

Which accounts do you want to connect?

Bank of America - Checking Balance: \$123.45	Checking ✓
Bank of America - Savings Balance: \$123.45	
Bank of America - Credit Card Balance: \$123.45	
Bank of America - Savings Balance: \$123.45	Savings ✓
Bank of America - Credit Card Balance: \$123.45	
Bank of America - Credit Card Balance: \$123.45	
Bank of America - Credit Card Balance: \$123.45	Choose account type ?

- In the *Pull Transactions* dropdown, select the timeframe of when to pull the transactions from.
Note: If you already have transactions in QuickBooks, carefully consider the date to avoid duplicate entries.

We will pull transactions from the selected accounts from 1/1/2025. Or you can select a different date to pull transactions from. Some bank limitations may apply.

This year

▼

Connect

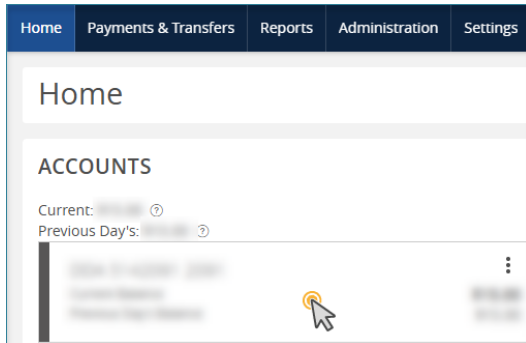
- Click **Connect**.

Web Connect

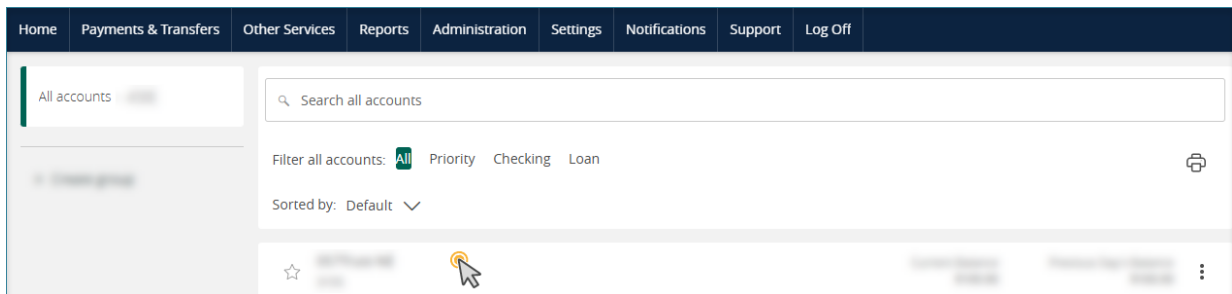
For *Web Connect*, users first need to download the QBO File from ANB Go Business.

Download file from ANB Go Business

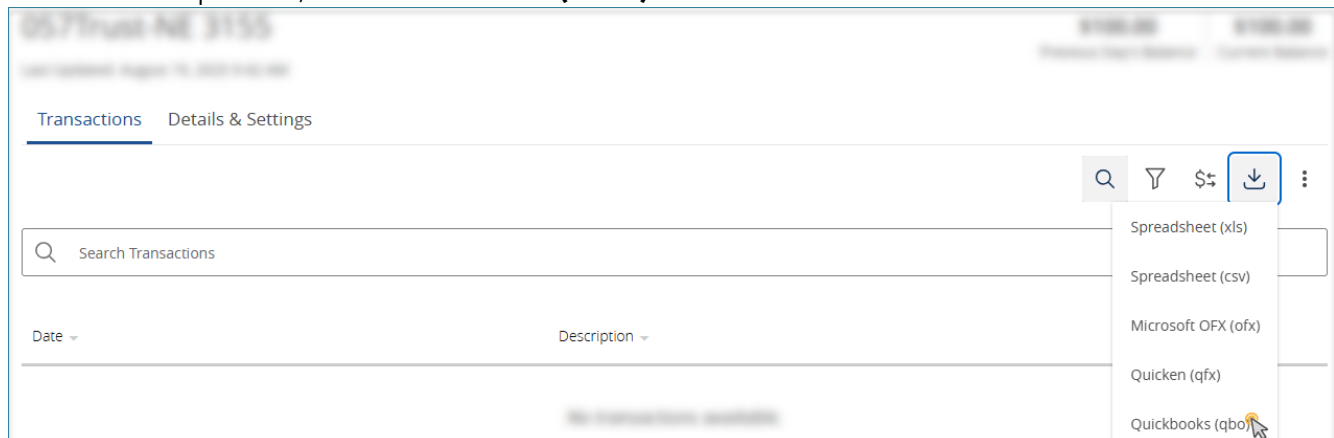
1. Log onto **ANB Go Business**.
2. On the **Home** page, click on the account you would like to download transactions for.
 - a. Tile View



- b. Account List View



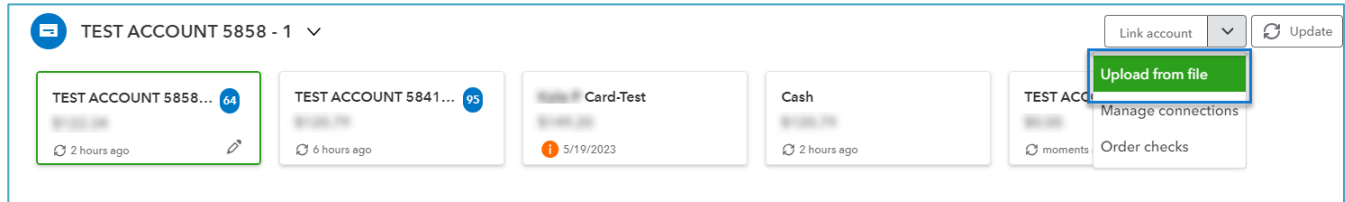
3. Select **Under the Transactions** tab, click the **export** icon.
4. Under the drop down, click **QuickBooks (QBO)**.



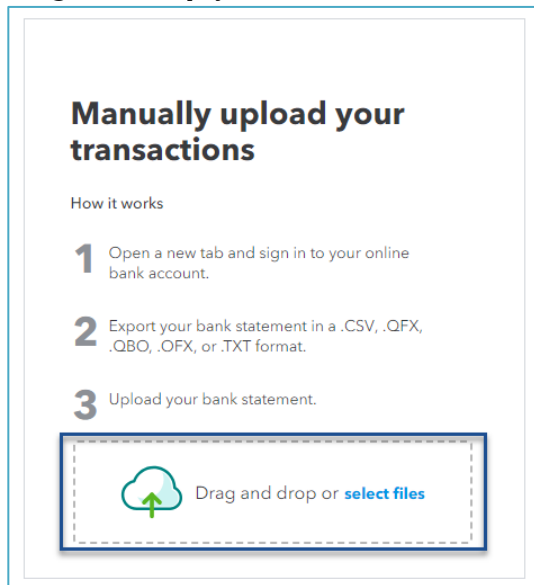
5. Repeat for each account you would like to integrate into QuickBooks.

Import file from ANB Go Business into QuickBooks

1. Log into QuickBooks online.
2. Select **Transactions** on the menu bar.
- Note:** Depending on your role, your access may look different.
3. Select the **down arrow** next to *Link Account*.
4. Select **Upload from file**.



5. **Drag and drop** your file or click on **select files** to browse.



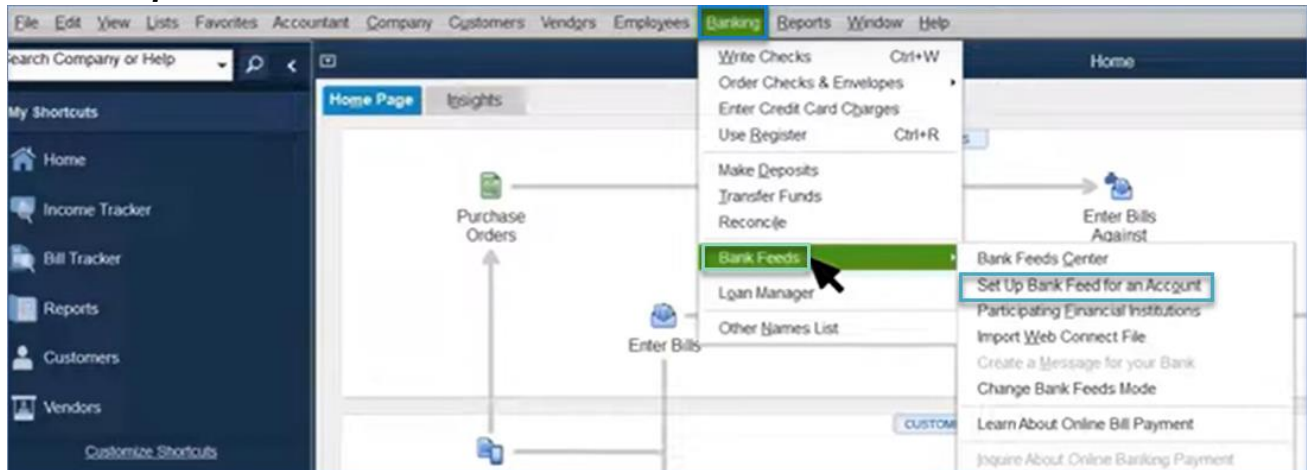
6. Select **Next**.
7. Assign the QBO Accounts
8. Select **Next**.
9. Select **Let's Go**.

For a step-by-step video of completing this step in QuickBooks, please visit [QuickBooks Online \(intuit.com\)](https://quickbooks.intuit.com)

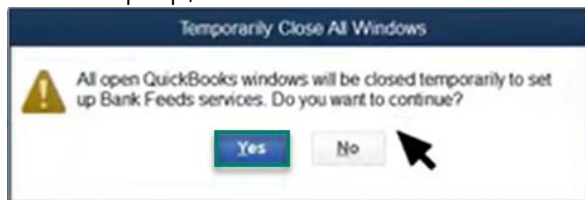
Direct Connect

Direct Connect is used directly from their desktop application.

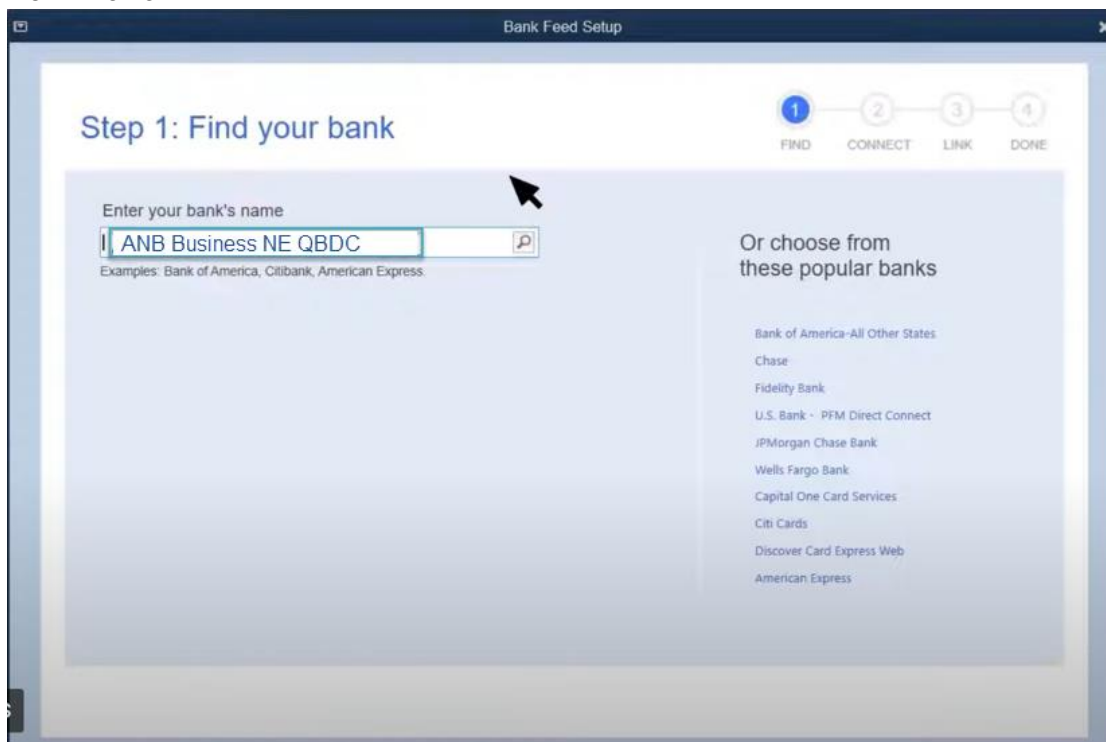
1. The client will need to open the desktop application.
2. In the navigation bar, click **Banking** and then **Bank Feeds**.
3. Click **Set Up Bank Feed for an Account**.



4. In the Pop-up, click **Yes** to close all windows.



5. Step 1: In the *Enter your bank's name* search bar, enter in American National Bank - DC or select from the list.



6. Step 2: Enter in your ANB login information into the fields below.

7. Step 3: Link your account.
- From the QuickBooks accounts column, select the **Select existing or create new** dropdown.
 - Select from the menu options: **Operations - Bank**.

8. Click **Connect**.
9. Once done, you'll be able to see all of your business accounts with ANB.

FileEditViewListsFavoritesAccountantCompanyCustomersVendorsEmployeesBankingReportsWindowHelp

Search Company or Help

My Shortcuts

Home

Income Tracker

Bill Tracker

Reports

Customers

Vendors

Customize Shortcuts

My Shortcuts

View Balances

Run Favorite Reports

Bank Feeds

Finish laterRules

Bank and Credit cards

Sync this Bank

Add account

Operations

Account ending in ""1947\$25,007.19

In QuickBooks\$0.00

Transactions pending for review2

Savings

Account ending in ""0289\$2,623.71

In QuickBooks\$0.00

Transactions pending for review7

Recognized (0)

Partially-recognized (0)

Unrecognized (2)

Added to register (0)

search in Payee, Memo...

	Date ↑	Check no ↓	Downloaded as ↓	Payee ↓	Bank memo ↓	Account ↓	Payment ↓	Deposit ↓	Action
☐	10/1/2025		10/1/25 00000 0000		SAMPLE NAME			4,259.82	Add ↓
☐	10/1/2025		10/1/25 00000 0000		BUSINESS TO BUSIN...		185.00		Add ↓

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