AMERICAN NATIONAL BANK®

QuickBooks User Guide

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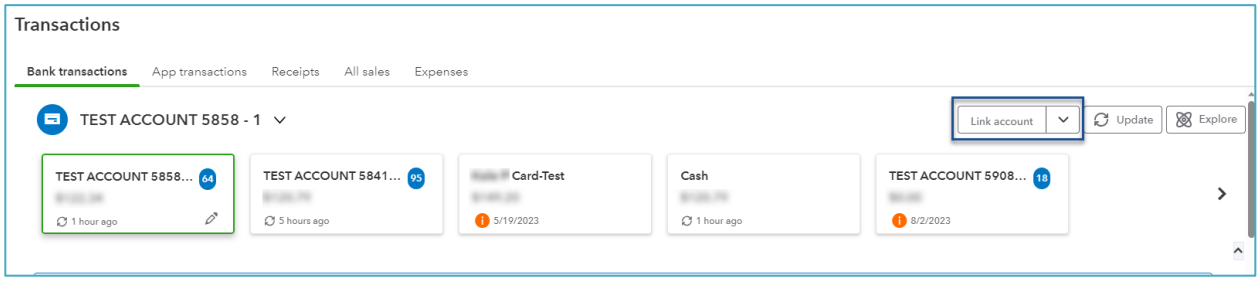
QuickBooks Online

Express Web Connect

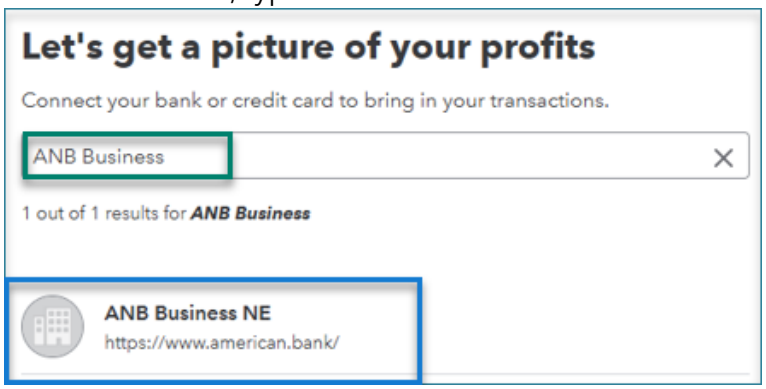
From your menu bar – Click on ***Banking***.
Note: Depending on your role, your access may look different.

Link a new Account.

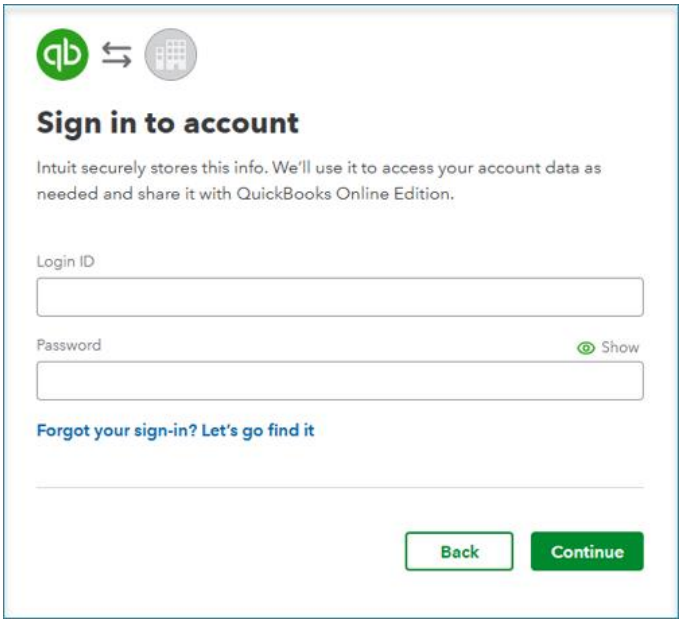
1. Click On ***Link Account***.



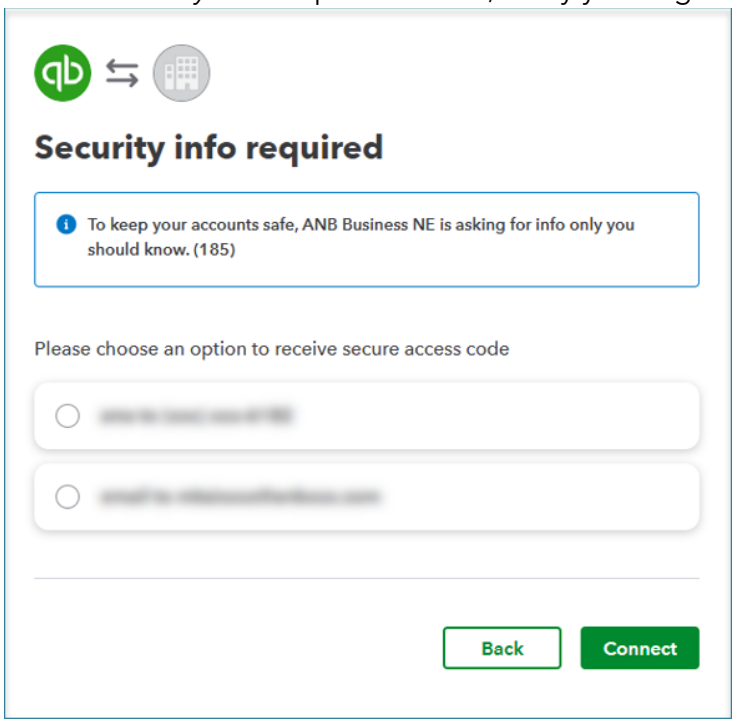
2. In the search bar, type in ***ANB Business NE***.



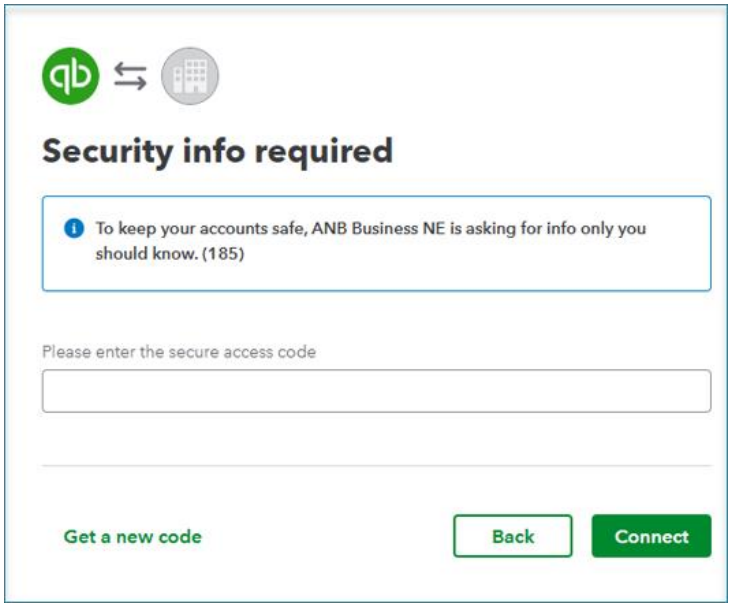
3. Locate ANB using the URL: **https://www.american.bank/**
4. Sign into account using your ANB Go Business login information.
    - Login ID
    - Password



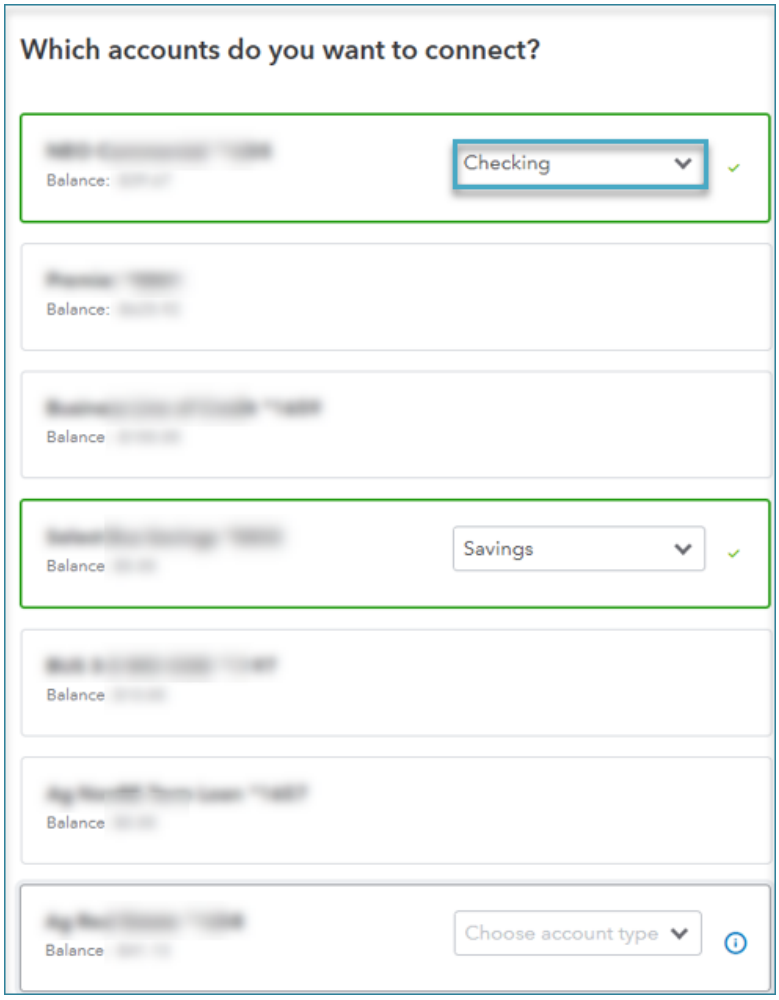
5. Click ***Continue***.
6. On the *Security* info required screen, verify your login by receiving a secure access code.



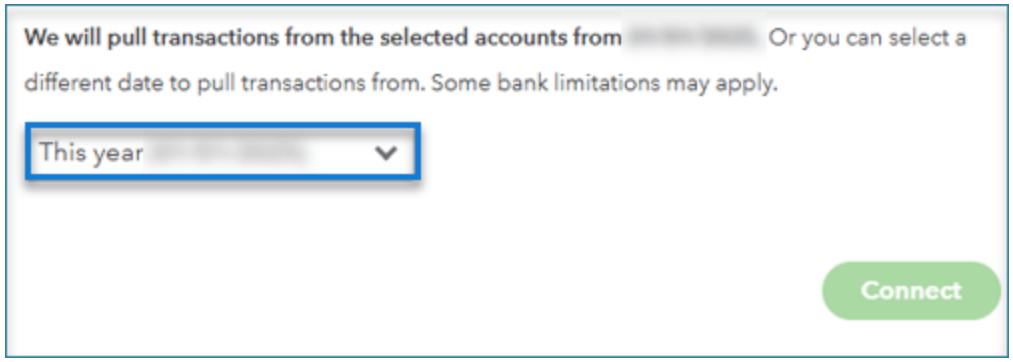
7. Once you receive the secure access code, enter the code in the box.
8. Click ***Connect***.



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



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.



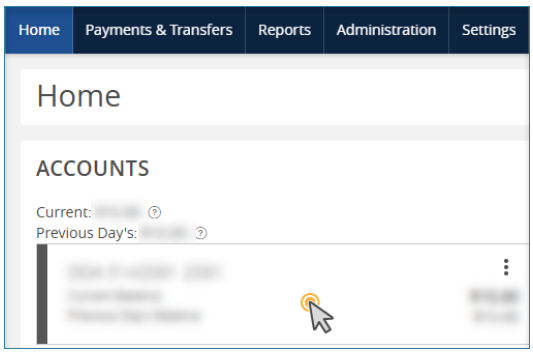
12. Click ***Connect***.
13. Link another account or QuickBooks will provide additional integration options (Remind Me Later).

Web Connect

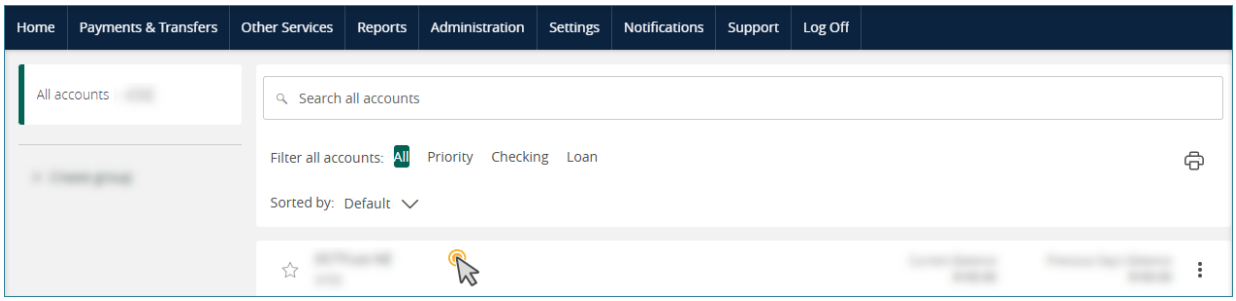
For *Web Connect*, users first need to download the QBO File from ANB Go Business.

Download file from ANB Go Business

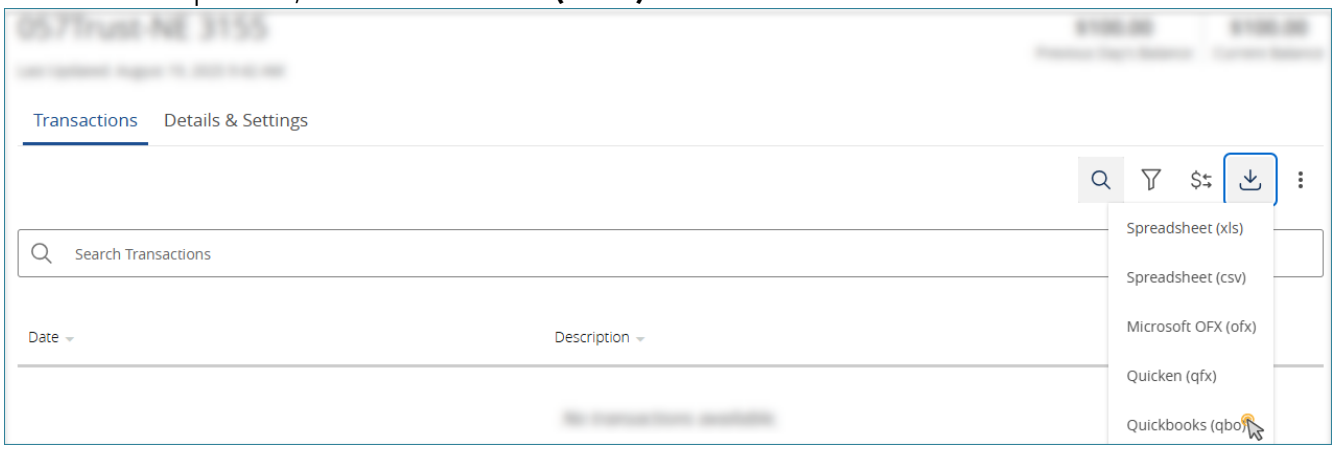
1. Log onto ***ANB Go Business***.
2. On the ***Home*** page, click on the account you would like to download transactions for.
   a. Tile View



   b. Account List View



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

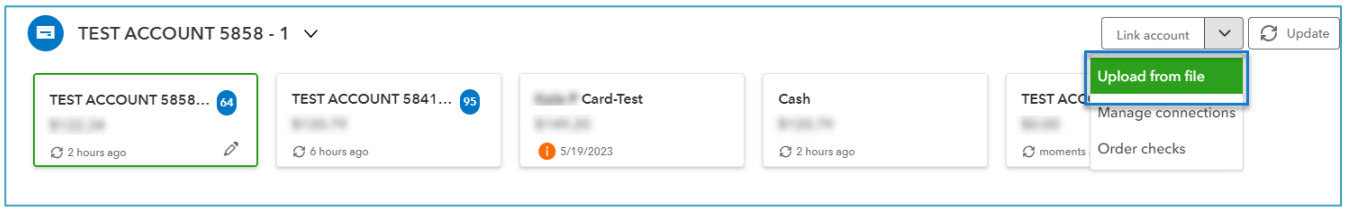


5. Repeat for <u>each</u> account you would like to integrate into QuickBooks.

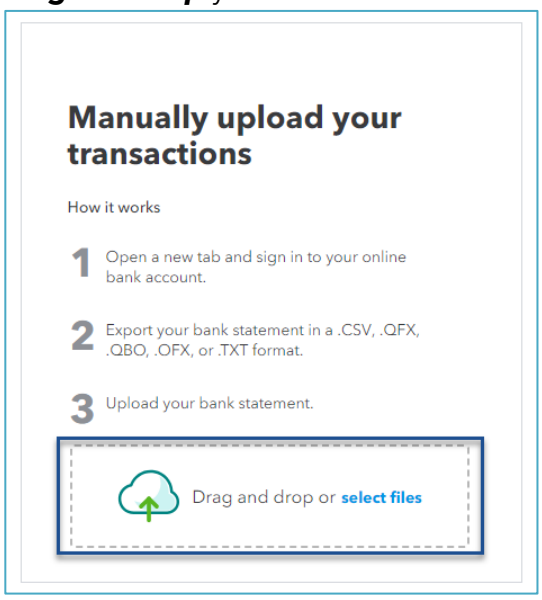
Import file from ANB Go Business into QuickBooks

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.



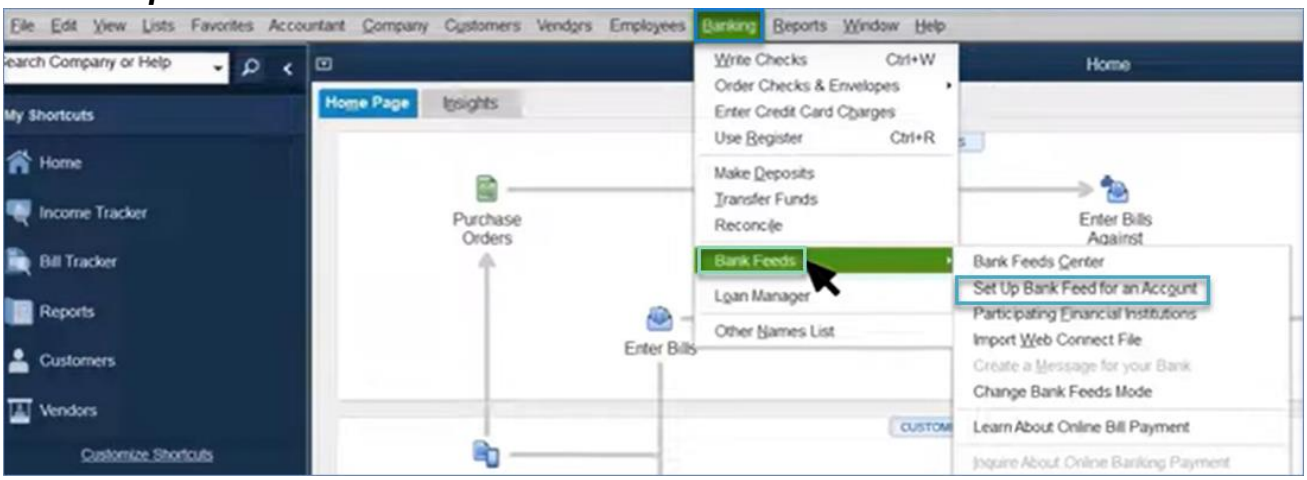
6. Select ***Next***.
7. Assign the QBO Accounts
8. Select ***Next***.
9. Select ***Let's Go***.

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

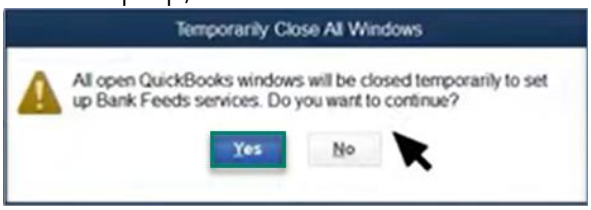
Direct Connect

Direct Connect is used directly from their desktop application.

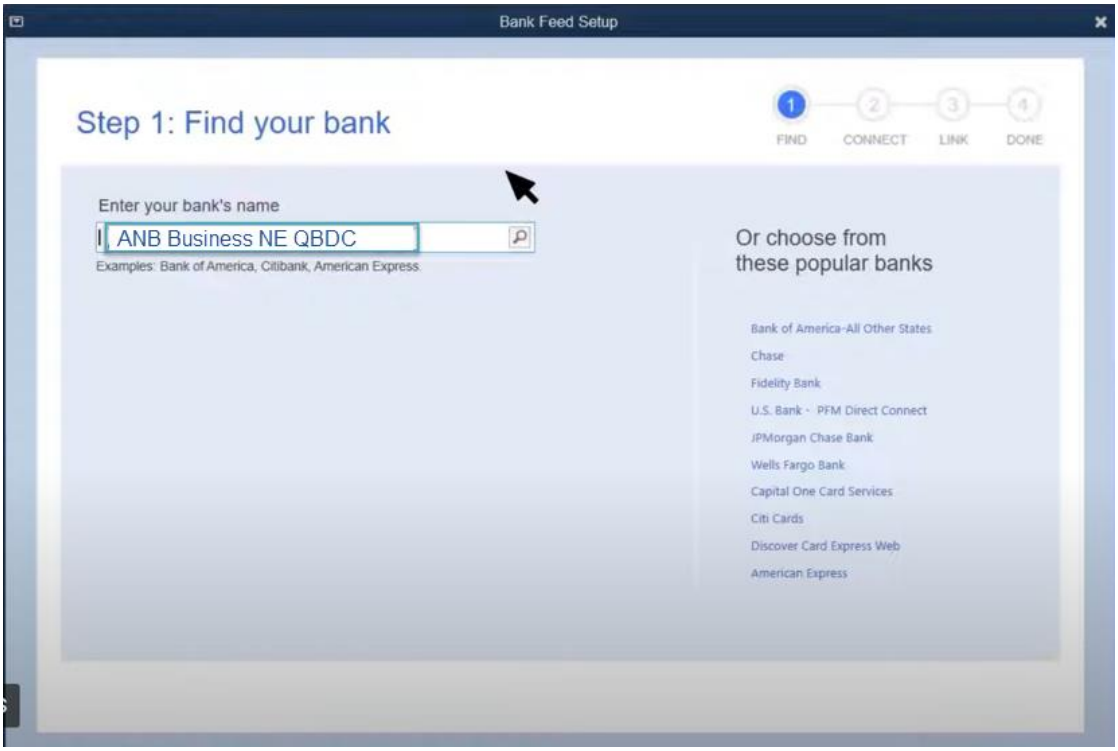
1. The client will need to open the desktop application.
2. In the navigation bar, click ***Banking*** and then ***Bank Feeds***.
3. Click ***Set Up Bank Feed for an Account***.



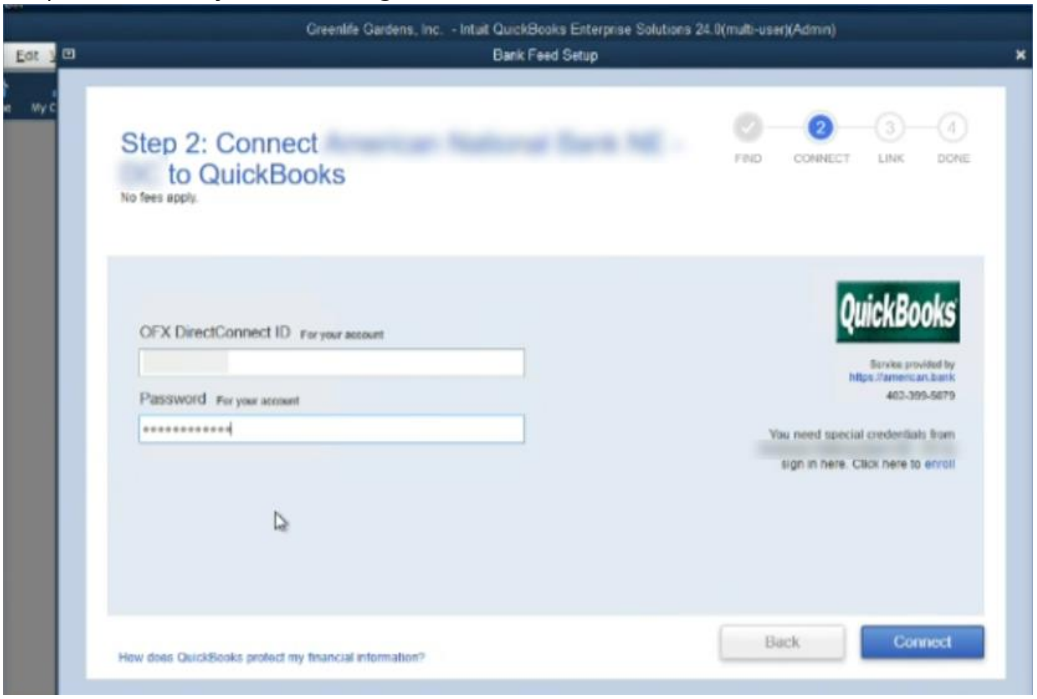
4. In the Pop-up, click ***Yes*** to close all windows.



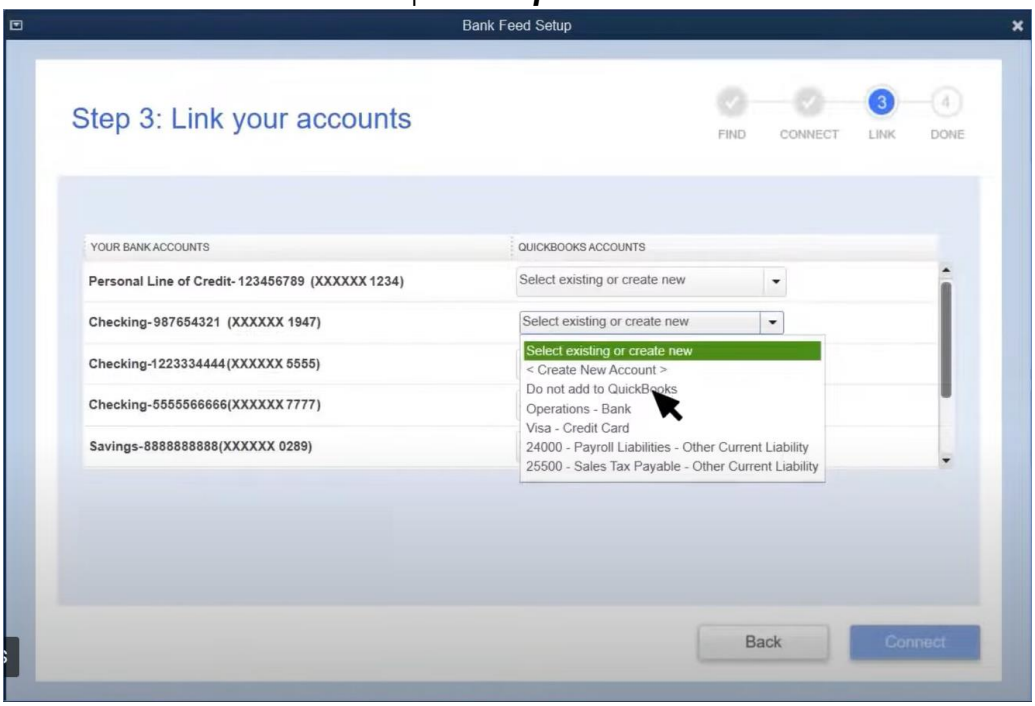
5. Step 1: In the *Enter your bank's name* search bar, enter in American National Bank – DC or select from the list.



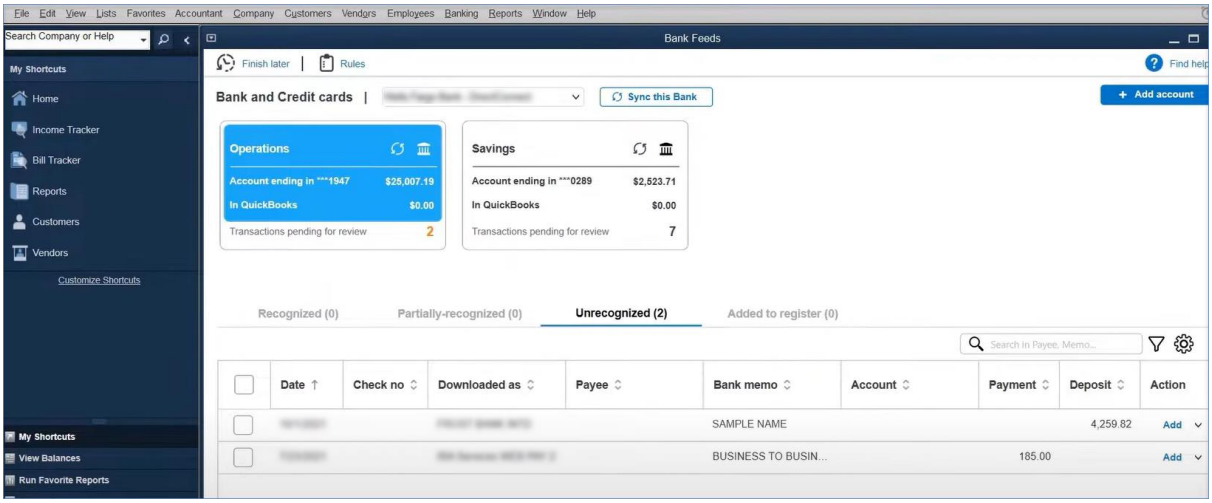
6. Step 2: Enter in your ANB login information into the fields below.



7. Step 3: Link your account.
    a. From the QuickBooks accounts column, select the ***Select existing or create new*** dropdown.
    b. 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.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Search Company or Help
Bank Feeds
My Shortcuts
Home
Income Tracker
Bill Tracker
Reports
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Vendors
Customize Shortcuts
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Find help
Bank and Credit cards
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7
Recognized (0)
Partially-recognized (0)
Unrecognized (2)
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Check no
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Payee
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Run Favorite Reports