

Support & Instructions QuickBooks®

QuickBooks on your PC:

If you have purchased a QuickBooks to use on your PC/Desktop (which is different than the web-based “QuickBooks Online”), Seven Seventeen Credit Union provides the ability to export your business account information at no cost. In NetWorth 24 Online Banking, click on your business account, and look for the “export” feature. QuickBooks exports in a “qbo” format.

Data import questions and service issues should be directed to QuickBooks support. QuickBooks provides excellent Customer Service and will help you to walk through setting up your new account, including connecting your financial institution. QuickBooks will not work with Seven Seventeen Credit Union on behalf of our members. Instead, they want our members to call them directly, and they will help our members to enroll.

QuickBooks Support:

- Phone: **1-800-488-7330**
- Website: <https://help.quickbooks.intuit.com/> *

Instructions/Screenshots:**

In an effort to help our members to get started on the right path, we are sharing the above screenshots and instructions from the set up and export of account history to QuickBooks 2013.

- Steps 1-15 relate to those who are just setting up their QuickBooks relationship.
- Steps 16+ detail the export of your account info from Online Banking.
- View our [Screenshots](#):
- If you are unable to open the link, please copy and paste this URL into your browser:
<https://www.717cu.com/Documents/QuickBooks-Screenshots.pdf>

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***Note: The business may have a different version of QuickBooks and an entirely different exporting/importing process. If so, some or all of these instructions may not apply to them. We encourage the business to contact QuickBooks at the phone number above.*

QuickBooks Online:

If you are using a web-based version of QuickBooks, you will select Seven Seventeen Credit Union as your financial institution. QuickBooks will walk you through the set up step-by-step. When you are given the opportunity to “Connect Bank Account,” you have two options:

- You can click on “Seven Seventeen Credit Union” (*click the option WITHOUT the words “Business Banking”*)
- Or, instead of clicking on Seven Seventeen’s link, type our website www.717cu.com into the box where it says “Connect Bank Account”.