

Quicken® & Quickbooks® Integration Options



PRODUCT	QUICKBOOKS® ONLINE	QUICKEN®
FEATURES	In QuickBooks®: -view bank account activity	In First Business Online Private Banking -download account activity into a Quicken® formatted file that can be uploaded into Quicken®.
HOW TO SET-UP QUICKBOOKS® INTEGRATION	Enter your Online Business Banking login credentials into QuickBooks® -Note: if you use a token to access Online Business Banking, contact your First Business representative to be set up with a separate Online Banking profile for QuickBooks®.	Automatically available in Online Private Banking.
GETTING STARTED GUIDES	https://quickbooks.intuit.com/tutorials/lessons/connect-to-bank-account/	Login to Online Private Banking > Accounts > Download Banking Transactions > Quicken® software > Download Transactions

Want to Learn More?

Please contact Treasury Management Support at TMSupport@firstbusiness.bank or by phone in Wisconsin at 608-232-5938 or in Kansas at 913-717-6464.