

# QuickBooks Online Instructions

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1. Enroll in MoneyView Online banking at [www.pvfcu.org](http://www.pvfcu.org).
2. In QuickBooks online, choose **Transactions > Banking**.
3. In the provided search box, enter Park View FCU.
4. In the drop-down menu below, find and click the link for Park View FCU.
5. Type your **Company ID** (if one is required), **User ID** and **Password**. Click **Sign In**.
6. Associate the account for Park View FCU with the appropriate account already listed in the drop-down list on the right.

**IMPORTANT:** Do NOT select +Add new. If you are presented with accounts you do not want to track in this data file, uncheck the box next to the Account name so that they do not import.

7. When all accounts have been matched, click **Connect**.
8. After the download is finished click **Let's go!**

## Additional Instructions: Manually Import Transactions

1. Enroll in MoneyView Online banking at [www.pvfcu.org](http://www.pvfcu.org).
2. Download a Web Connect file from MoneyView in one of the formats QuickBooks online supports:
  - .qbo (QuickBooks)
  - .qfx (Quicken)

**NOTE:** Take note of the date you last had a successful connection in your QuickBooks account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

3. In QuickBooks Online, choose **Transactions > Banking**.
4. Click the drop-down menu for the **Update** box in the upper-right corner. Select **File Upload**.
5. Click **Browse**, select Park View FCU Web Connect file from your computer, then "**Open**."

6. Click **Next**.
7. In the drop-down menu under **QuickBooks Account**, select the account where you would like to upload the transactions. Click **Next**.
8. After the download is finished click **Let's go!**
9. Click the **For Review** tab to see what was downloaded.