# QuickBooks Self-Employed Getting Started Guide for Financial Institutions

*Financial Institution Support – OFX Connectivity Group*

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# QuickBooks Self Employed Getting Started Guide

***Thank you for choosing QuickBooks Self Employed!***

## About this Guide

This guide helps you get started with QuickBooks Self Employed as quickly as possible. You'll learn:

- What is QuickBooks Self Employed?

- How to connect QuickBooks Self Employed to your bank account data.

- How to update accounts.

## What is QuickBooks Self Employed?

QuickBooks Self-Employed is designed for independent contractors and freelancers. It automatically imports transactions and tracks mileage, exports your Schedule C, and helps you maximize deductions at tax time.

## Features

- Track mileage automatically: Drive away with more deductions when your mileage is logged automatically and trips are categorized with a swipe.

- Finances made simple: Untangle your business and personal expenses on the go. Use the mobile app to track your income with a swipe.

- No more manual backups: Never worry about saving your file to a USB drive. QuickBooks Self Employed is backed up automatically with bank-level security.

- Point, snap, store: A quick pic is all it takes to keep every receipt at your fingertips so you don't have to worry about losing them.

- Money-saving deductions: Put expense tracking on autopilot. Automatic categorization makes it easy to see your total income, expenses and profit.

- Easy quarterly taxes: We do the math to help you set money aside for worry-free quarterly taxes. No more year-end surprises.

# Connect and Update Your Data

## How QuickBooks Self Employed Connects to Your Financial Institution

QuickBooks Self Employed connects to your financial institution via technology that interacts directly with your financial institution's website. QuickBooks Self Employed also supports .csv file uploads as an optional method to update your bank accounts.

## Connect an Account

1. Open a web browser and log in to QuickBooks Self Employed.

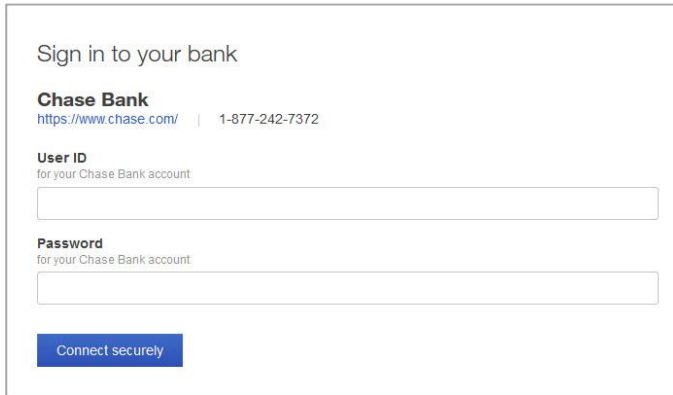2. On the Home screen, click Transactions in the left sidebar.
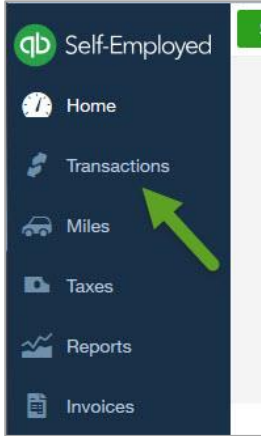


3. You will then have the option to connect an account or add an account. Click Connect Account on the left or click the dropdown by Add Transaction and then click Add Account
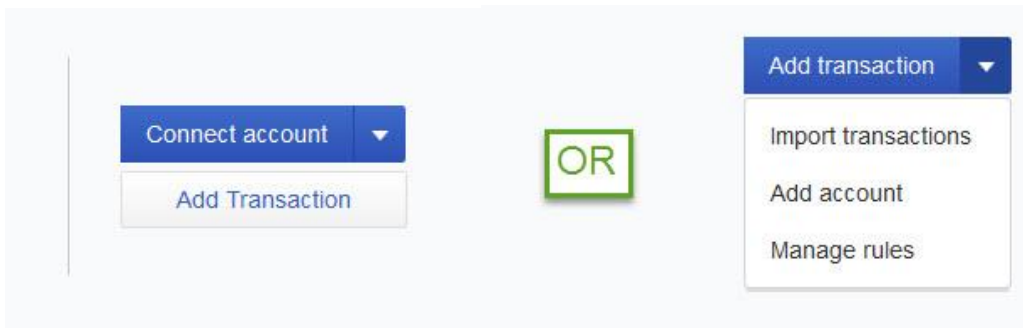


4. Enter your financial institution's name or your financial institution's online banking website URL in the search field and click the search icon.
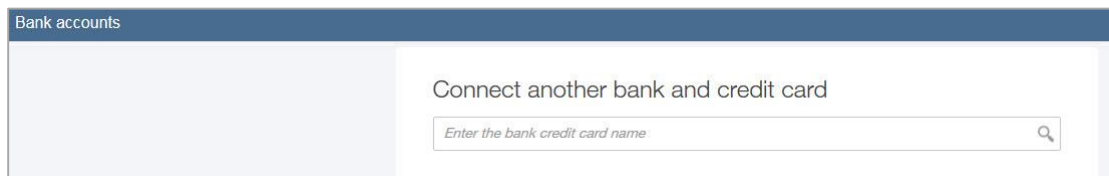
5. QuickBooks Self Employed will now display a list with the search results. Click your financial institution in the list to access its login screen.

6. In the login screen, enter the same credentials you use to access online banking, then click Connect Securely.
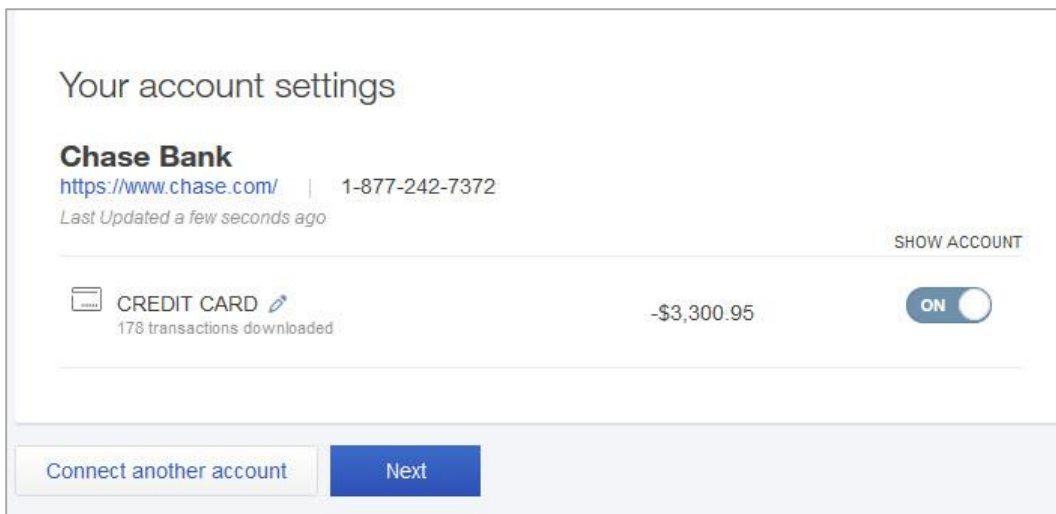
Sign in to your bank

**Chase Bank**
https://www.chase.com/    |    1-877-242-7372

**User ID**
for your Chase Bank account

**Password**
for your Chase Bank account

Connect securely

7. QuickBooks will establish a secure connection with your financial institution, and show your accounts at that institution. You can show or hide accounts by toggling the slider under Show Account.

Your account settings

**Chase Bank**
https://www.chase.com/    |    1-877-242-7372
Last Updated a few seconds ago

SHOW ACCOUNT

CREDIT CARD
178 transactions downloaded                    -$3,300.95                    ON

Connect another account          Next

8. After you have set the show/hide feature for your accounts, select Next and then Done to complete the account setup or Connect Another Account to add another institution.