

QuickBooks Online Troubleshooting Steps

Part 1 11/16/2015

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Troubleshooting Introduction

IMPORTANT: DO NOT instruct the customer to clear cookies for banking errors.

IMPORTANT: DO NOT instruct the customer to Disconnect/ Reconnect until you have tried in Sample Company using the steps below

Manual Update

Update (this is called a manual update and is in the top right of the Banking Page) Perform **3** manual updates with the customer. This can resolve a few types of connection issues.

Look for other possible links for the bank.

Follow These Steps First

If the account is not yet connected:

1. Choose Transactions > Banking.
2. In the upper right-hand corner, click Add Account.
3. Enter the name of the financial institution, then click Find.
4. For a global bank, choose ON in the Search global banks field.
5. Click link for the bank that matches their account (Account needs to be a bank or credit card account.)
6. Enter the sign-in credentials for the bank and click Log In.

NOTE: When connecting the bank to QuickBooks Online, you must use the primary user's website login credentials.

7. If their bank requires extra information, enter it and click Log In.
8. Check the box to the left of the account that you want to connect and click the QuickBooks Account drop-down menu to choose the QuickBooks account (from their Chart of Accounts).

If they don't have the account created, they can click +Add New and create the account.

9. Click Connect. This will take a few minutes.
10. When it is finished connecting, click the blue That's it, I'm finished! button.
11. After your download finishes, click the New Transactions tab to see what was downloaded.

If the account is connected:

1. Go to the banking page and click the pencil icon for the Account experiencing the issue.
2. Click Edit Sign In Info.
3. Click the hyperlink for their bank under the bank name and try to log in with their credentials. If they are able to log in, then you'll need to use the troubleshooting steps below for their specific error.
4. If they still can't log in, have the customer copy the URL at the login page of their bank (in a new tab outside of QuickBooks Online) and paste that URL in the bank search field instead of the bank name within the Add Account Setup.
5. If their bank displays, click the one marked Existing Connection and log in with their credentials and they should be able to see what is already connected.

If they still receive an error after that, use the troubleshooting steps below

Test in Sample Company

If they were able to connect successfully at some point in the past, you can have them try to connect to the QuickBooks Online Sample company. The purpose for this is to see if the connection is possible in a different company environment.

Connect their bank in the sample company: <https://qbo.intuit.com/redir/testdrive>

Tip: Have the customer create a new bank account on the Chart of Accounts and connect their bank to that account in the sample company to avoid the error that says the bank is already connected.

If the customer experiences the same issue or error in the sample company, DO NOT attempt to have the customer Disconnect/Reconnect their account in their main QBO company. If the customer is able to connect successfully in the Sample Account, YOU MAY have them Disconnect/Reconnect this bank account in their main QBO company.