

Transaction download setup guide

Key2Business[®] and QuickBooks Online

Key2Business clients utilizing Key2Business.com now have the ability to download their commercial card transactions to QuickBooks[®] from Key2Business.com. Clients can then reconcile transactions in QuickBooks. Follow the steps on the following pages to set up the transaction download.

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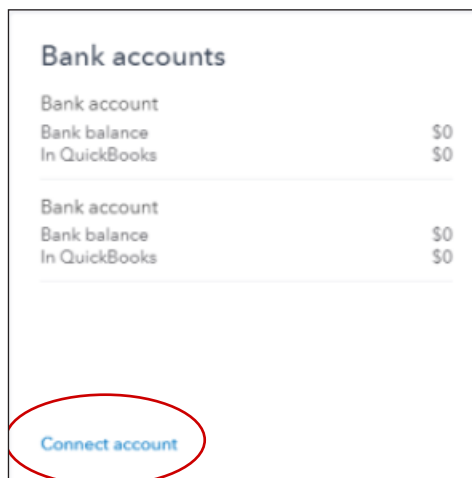
Key2Business® and QuickBooks Online

Before you begin confirm the following:

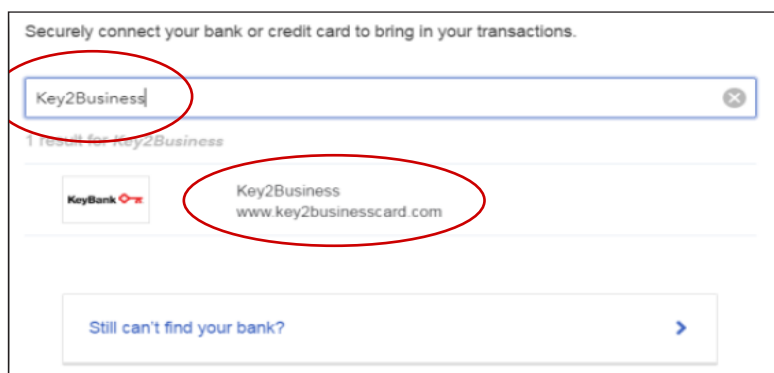
- You are an active user of Key2Businesscard.com with a valid username and password.
- If you haven't already, you will need to establish services with QuickBooks® Online in order to utilize the transaction download feature.

Connecting your Key2Business account to QuickBooks

- In the **Bank Account** section of QuickBooks, click on the **Connect Account** link.

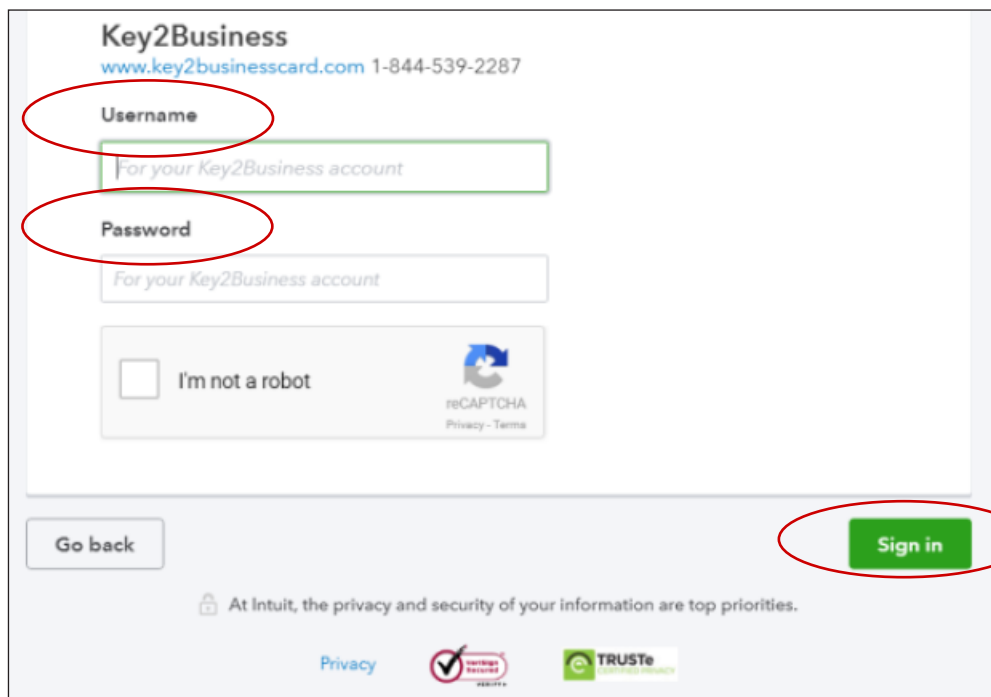


- Enter **Key2Business** in the search criteria section. Then, click the link to www.key2businesscard.com.



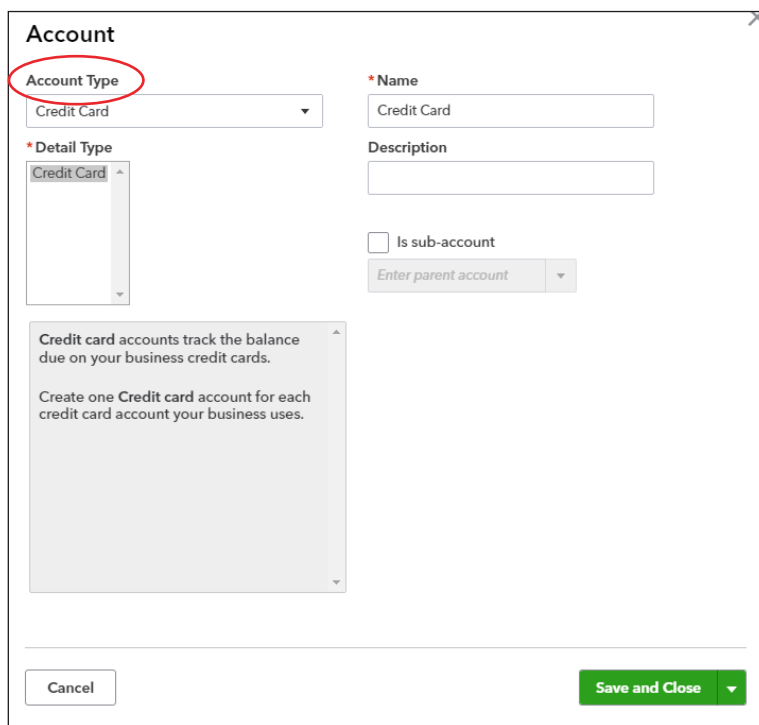
Key2Business® and QuickBooks Online

- Enter your Key2Business.com username and password. Then, click **Sign In**.



The image shows the Key2Business login page. At the top, it says "Key2Business" with the website "www.key2businesscard.com" and phone number "1-844-539-2287". Below this are two input fields: "Username" and "Password", both with placeholder text "For your Key2Business account". These fields are circled in red. Below the password field is a reCAPTCHA box with the text "I'm not a robot" and a "Sign in" button, which is also circled in red. At the bottom left is a "Go back" button. At the bottom center, there is a statement: "At Intuit, the privacy and security of your information are top priorities." followed by "Privacy" and "Terms" links. At the bottom right, there are logos for "TRUSTe" and "VeriSign".

- If this is the first credit card being added, you will choose **Credit card** from the drop-down list. If you already have a credit card in QuickBooks, you may see additional options.
- Follow the instructions within QuickBooks on how to download your Key2Business card account transactions.



The image shows the "Account" setup window in QuickBooks. The "Account Type" dropdown menu is circled in red and set to "Credit Card". To the right, the "Name" field is labeled "* Name" and contains "Credit Card". Below that, the "Description" field is empty. There is a checkbox for "Is sub-account" which is unchecked, and a dropdown menu for "Enter parent account". At the bottom, there is a "Cancel" button and a "Save and Close" button. A large text box at the bottom contains the following text: "Credit card accounts track the balance due on your business credit cards. Create one Credit card account for each credit card account your business uses."



Key2Business® and QuickBooks Desktop

Helpful resources

- The passwords for Key2Business.com and QuickBooks Online are linked. If you change your password in one application, you must update both application passwords.
 - Documentation on QuickBooks Online is available from Intuit at:
<https://quickbooks.intuit.com/learn-support/>.
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Let's start the conversation

Contact Key2Business Client Support at 1-800-539-9039, option 3 or Key2Business_Call_Support@keybank.com.

