Quickbooks Online – Linking Accounts

1. Log into your QuickBooks online account using your QuickBooks credentials.



2. Find Banking Services in the menu on the left-hand side



3. Select Link Account



4. Search for South Shore Bank – select South Shore Bank Personal

er your bank name or URL	Q	Connect you	r bank or credit card to bring in your transactions.	
upport 20,000+ local and internatio	onal banks.	south shore	bank	(
		10 results for	south shore bank	
Citibank Credit Card	Chase Bank	<u>.</u>	South Shore Bank - Personal www.southshorebank.com	
Bank of America	Wells Fargo		South Shore Bank - Business www.southshorebank.com	
apital One	U.S. Bank	1	Florida Shoree Bank - SouthWeet www.floridashoresbanksw.com	
ect to PayPal	PNC Bank - Busines		Florida Shoree Bank - SouthEast www.floridashoresbank.com	
Sh	now more			
G				

5. Enter in your South Shore Bank online banking credentials

ick Contin

6. You will be asked for a verification code – this is driven by your selection in online banking.

- a. If you have opted in for text messages you will get a text message with the verification code
- b. If you are only opted in for voice, you will get a phone call with the verification code

Sign in to account	Sign in to account
South Shore Bank - Personal https://www.southshorebank.com/ 7816823715	South Shore Bank - Personal https://www.southshorebank.com/ 7816823715
For your security, South Shore Bank - Personal requires additional verification info. (185)	Enter the verification code send to you Enter for South Shore Bank - Personal
Please choose how you would like to receive the Registration Code:	Get new code
O SMS to ***.***	
O VOICE to ***.**	Back Continue
Back	

7. Select the applicable accounts you wish to connect to QuickBooks

Which accounts do you want to connect?			
	Business Checking *1 Balance: 93.70		
	Business Checking * Balance: 100.83		
Selec	.t a date to pull transactions from. Some bank limitations may apply.		
	Next		
	$\stackrel{\frown}{\oplus}$ At Intuit, the privacy and security of your information are top priorities.		
	Privacy Visiting TRUSTe		

8. Select the appropriate date you wish to upload

Select a date to pull transactions from. Some b		oank limitations may apply.
	\sim]
Today (05/18/2023)		Next
This month (05/01/2023)		Next
This year (01/01/2023)		your information are top priorities.
Last year (01/01/2022)		Verificat Presey Average Transfer
Custom		

9. Rename your account(s) as you see fit for your business

Business	Account type	New account name
Shecking	Checking	Business Checking (
Balance: 93.70		
Salance: 100.83	Checking	Business Checking (
		Back Connect

10. The below screenshot is how your accounts will look once connected.

^ (Southern	South Shore Bank - Personal Created on 5/18/2023 at 8:16 am		
		Business savings		
		Business Statement Savings	\$29.24	
		Business Checking	\$142.70	
		Enhanced Business Money Market (.	\$17.42	

Troubleshooting

If the above steps do not work, please try disconnecting your South Shore Bank accounts and re-linking them using steps 1 through 9.