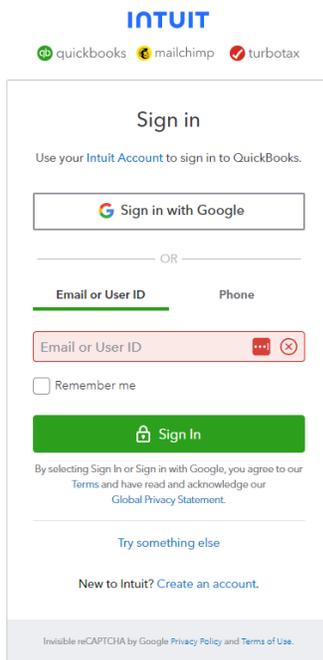
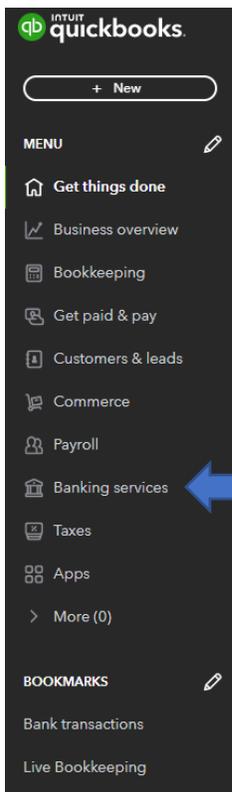


# Quickbooks Online – Linking Accounts

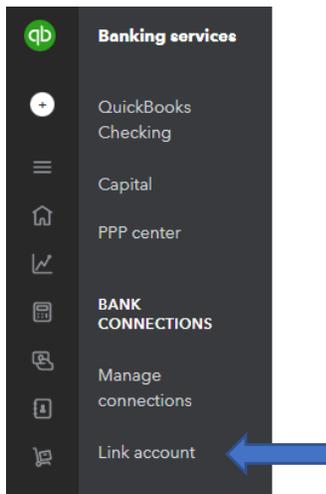
1. Log into your QuickBooks online account using your QuickBooks credentials.



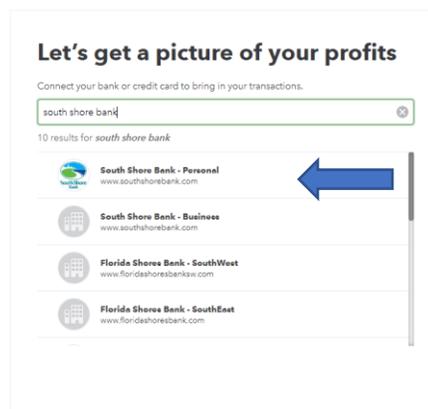
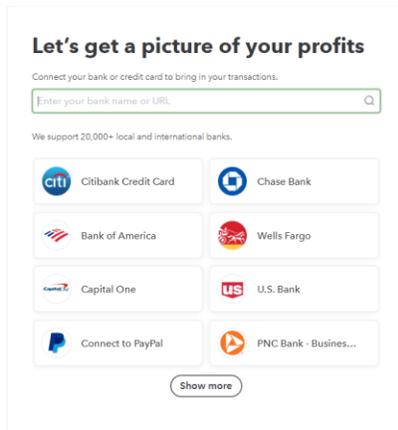
2. Find Banking Services in the menu on the left-hand side



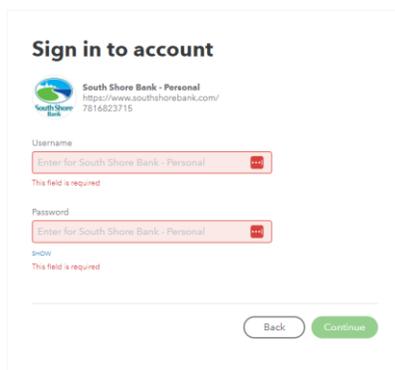
### 3. Select Link Account



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



### 5. Enter in your South Shore Bank online banking credentials



### 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



South Shore Bank - Personal  
<https://www.southshorebank.com/>  
 7816823715

For your security, South Shore Bank - Personal requires additional verification info. (185)

Please choose how you would like to receive the Registration Code:

- SMS to \*\*\*.\*\*\*.
- VOICE to \*\*\*.\*

[Back](#) [Continue](#)

### Sign in to account



South Shore Bank - Personal  
<https://www.southshorebank.com/>  
 7816823715

Enter the verification code send to you

[Get new code](#)

[Back](#) [Continue](#)

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

Which accounts do you want to connect?

- Business Checking \***  
Balance: 93.70

---

- Business Checking \***  
Balance: 100.83

Select a date to pull transactions from. Some bank limitations may apply.

[Next](#)

At Intuit, the privacy and security of your information are top priorities.

[Privacy](#)



## 8. Select the appropriate date you wish to upload

Select a date to pull transactions from. Some bank limitations may apply.

Today (05/18/2023)

This month (05/01/2023)

This year (01/01/2023)

Last year (01/01/2022)

Custom...

[Next](#)

your information are top priorities.

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

**OK, we'll connect your account**  
 Edit your account name in QuickBooks here, or change it later.

**Business Checking**  
 Balance: 93.70

Account type:  New account name:

---

**Business Checking**  
 Balance: 100.83

Account type:  New account name:

At Intuit, the privacy and security of your information are top priorities.

Privacy



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

South Shore Bank - Personal <small>Created on 5/18/2023 at 8:16 am</small>			
Business savings			<input type="checkbox"/>
Business Statement Savings	\$29.24		<input type="checkbox"/>
Business Checking	\$142.70		<input checked="" type="checkbox"/>
Enhanced Business Money Market (.	\$17.42		<input checked="" type="checkbox"/>

## 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.