

Connecting to Quickbooks or Intuit products with Gateway Bank



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Quickbooks is a small business or personal use accounting software product purchased online. Quickbooks gives business owners and consumers the ability to categorize and track budgets through its programs.

If you do not have a current Quickbooks account, navigate to this link to set up a new account. <u>www.quickbooks.intuit.com</u>

Fees do apply and come directly from Quickbooks Intuit.

Create an Intuit accourt	nt	
Use for QuickBooks and all Intuit produ	icts.	
Email address (User ID)		
Mobile number		
Standard call, message, or data rates may app	bly.	
Password	Show	
	÷	
🔒 Sign Up With Email		

Gateway Bank customers have two options to allow integrated (merge) transactions between your Gateway accounts and the Quickbooks Intuit software.

1) Direct Integration - After establishing a Quickbooks account with your unique username and password, login to Quickbooks and look for your Menu option, Get Things Done. From your Dashboard or Home page, locate Bank Accounts and click on the blue Connect Accounts link.





On the next page, type <u>www.gatewaybank.bank</u> in the search bar. Be certain you type our exact URL to get to the correct Gateway Bank.

	get a pretare er year pretae
Connect you	r bank or credit card to bring in your transactions.
www.gatew	aybank.bank
1 result for и	ww.gatewaybank.bank
Gateway	Gateway Bank (AR) www.gatewaybank.bank

After clicking on the result for Gateway Bank (shown above), it will ask for you to enter your unique set of credentials for your Gateway Bank Online Banking account see below.

Gateway https:// (870) 3	www.gatewaybank.bank/ 25-6251	
Username		4
This field is required		_ <
Password		
Enter for Gatewa	iy Bank (AR)	
SHOW		

If you need to establish your Gateway Bank Online Account, please give your local branch a call or go to our website directly, click Login and then Enroll. www.gatewaybank.bank

gatewaybank.bank		e \star 🛪 🗆 🕻	
Gateway	PERSONAL BUSINESS RESOURCES CONNECT	LOGIL	
		Welcome back!	
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		SIGN IN Forget Password Enroll	

Once your Gateway Bank credentials are entered in Quickbooks, you will see the Quickbooks transactions area filled-in with the connected information from Gateway Bank.



2) Second option: Upload integration - Login to your Gateway Bank Online Account at <u>www.gatewaybank.bank</u>

Navigate to the accounts section on the dashboard. Click on the account you wish to integrate.

The screen will transactions listed in your account. From here, use the down arrow to download transactions.

Gateway				
Dashboard	x5597			
🖂 Messages 👩	Transactions	<u> </u>	Ð	Q
C Accounts	AMAZON DIGITAL SERVICE AMAZON DIGITAL SERVIC Pending Sep 11	E 888-802-30	\$8.3	\$1.99 86.61

A Download activity screen will pop up, asking the date range and file type you would like to download.

<	CHECKING (x5597)
Date range	Last month Aug 1, 2023 - Aug 31, 2023
File type	QuickBooks
	Download

The file type chosen should be QBO, then click Download. This will allow you to save your file to your computer or device.

After saving your file, Login to your Quickbooks Intuit account. Go to the account created under the same name as your Gateway Bank account (consumer or small business) and click on Transactions.



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Transactions						
Bank transactions	App transactions Receipts All sales Expenses					
47	RECOMMENDED QuickBooks Live Bookkeeping Leave the routine categorization to a virtual bookkeeper A Live Bookkeeper can categorize your transactions so you have clear records of how much your business makes and where the money goes. Tell me more					
💼 Cash	v		Link account	v Q u	odate	8 € E

Navigate over to Link account button.

Use the Dropdown arrow to choose Upload file. This box below will pop up allowing you to then upload your bank statement file from your Gateway Account to your Quickbooks Intuit account.



If you have further questions, please contact Kimberly Shaw Harris or your other friendly bankers at Gateway Bank 501-847-3440.

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Gateway Bank is a member of FDIC.