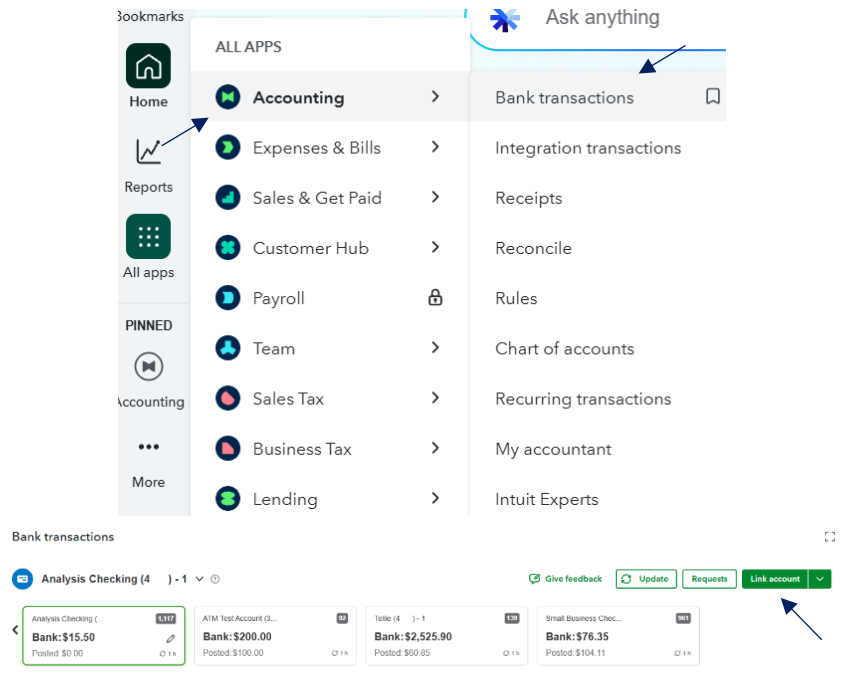




QuickBooks Online Connection Setup

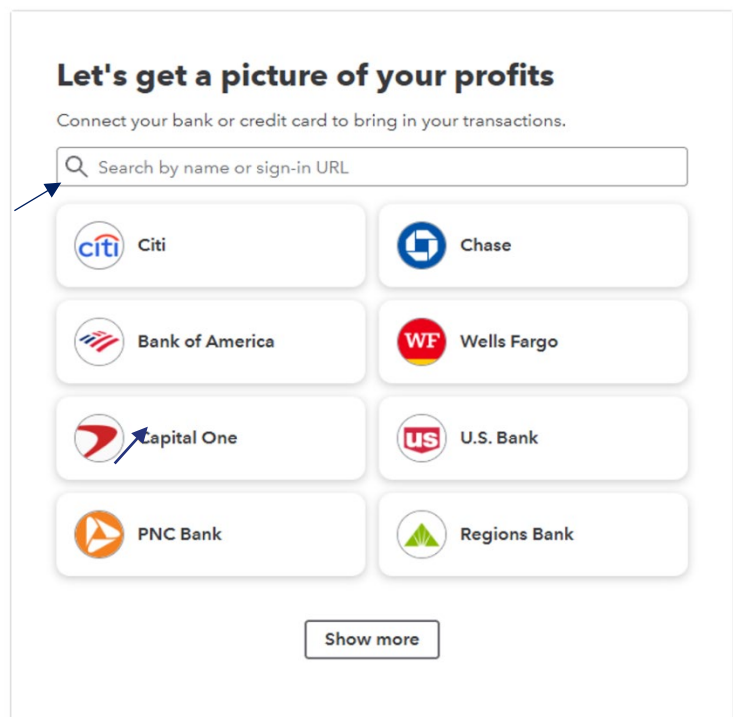
1. Login to QuickBooks, and under the 'Accounting' menu in the **All Apps** Section, select the **Bank Transactions** option to pull up the existing bank accounts.



2. Select 'Link Account' to start the connection process to add a new account.

3. On the next screen, in the search bar, input 'SNB of Omaha' to search for the correct financial institution.

NOTE: It is important to use the correct search term. Searching for 'Security National Bank' will bring up other financial institutions with similar names.



Questions? Please call our Treasury Operations Team toll-free at 877-686-3590.



4. On the next screen, input your **Login ID** and **Password** for Security National Bank online banking. This will authorize the connection between SNB and QuickBooks. Click '**Continue**' to proceed to the next screen.

Let's get a picture of your profits

Connect your bank or credit card to bring in your transactions.

1 out of 1 results for **SNB of Omaha**



SNB of Omaha
<https://securitynational.bank/>

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

[Privacy](#)



Sign in to account

Intuit securely stores this info. We'll use it to access your account data as needed and share it with QuickBooks Online.

Login ID

Password

 Show

[Forgot your sign-in? Let's go find it](#)

A message from SNB of Omaha

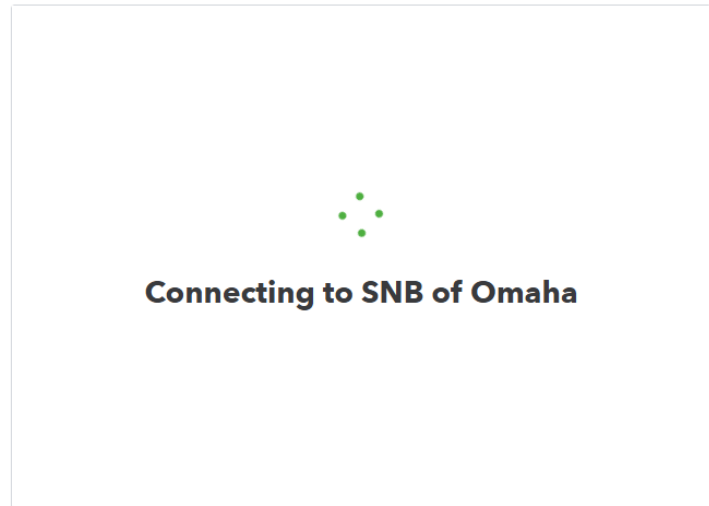
Please enter your Security National Bank of Omaha Username and Password required for login.

[Back](#)

[Continue](#)



- Wait for the QuickBooks connection process to be completed.



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

Privacy



- A Secure Access Code target will then need to be selected. Then select 'Continue'.

Sign in to account

To keep your accounts safe, SNB of Omaha is asking for info only you should know. (185)

Please choose an option to receive secure access code

☐ sms to (xxx) xxx-76

☐ sms to (xxx) xxx-35

☐ sms to (xxx) xxx-64

☐ email to tchaxxxx@snboxxxx.com

☐ email to :xxxxxxx@qx.com

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

Questions? Please call our Treasury Operations Team toll-free at 877-686-3590.



7. Input the **8-digit code** provided to verify the connection.



Sign in to account

i To keep your accounts safe, SNB of Omaha is asking for info only you should know. (185)

Please enter the secure access code

14851647

[Get a new code](#)

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



- On the next screen, select the accounts to be added to QuickBooks. In order to select the account type from the dropdown, click on the account number to activate the tile, and then click on the account type box.

- Select the date range of transactions to be imported, and then click '**Connect**'.

NOTE: If you are reconnecting an account that is already in QuickBooks, please note the date of the last transaction in QuickBooks so you don't duplicate entries.

Which accounts do you want to connect?

Choose account type

Analysis Checking *4

Balance: \$15.50

Checking



ATM Test Account *3

Balance: \$200.00

Checking



Tellie *4

Balance: \$2,525.90

Checking



Small Business Checking *4

Balance: \$76.35

Checking



50+ Interest *4

Balance: \$138.50

Checking



We will pull transactions from the selected accounts from 01/01/2025. Or you can select a different date to pull transactions from. Some bank limitations may apply.

Last year (01/01/2025)

Connect

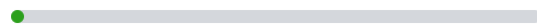
Bringing in your transactions

This will only take a moment.

Money in transactions



Money out transactions



- Once all accounts have been selected, QuickBooks will begin the process of importing the transactions for the account.



11. When the process has been completed, click on **'Done'** to complete the connection process and review the account within QuickBooks.



All set! You're connected and ready to go.

Done