

# How to Download Your QBO File

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Your bank's transaction history is the fastest way to get us clean records. Follow the steps for your institution below to export a QuickBooks (QBO) file, then send it to us through TaxDome or by email.

## Wells Fargo

- 1 Log in to your financial institution.
- 2 Click into any of your accounts.
- 3 Under **Activity**, click **Download Account Activity**.
- 4 Follow the steps shown in your online account:  
Choose the account you want to download  
Select date range 01/01/[prior year] – 12/31/[prior year]  
Select file format — **QuickBooks (QBO)**  
Download
- 5 Once the file downloads, upload it in TaxDome or email it to [info@globalasi.com](mailto:info@globalasi.com)

## Chase

- 1 Log in to your financial institution.
- 2 Click into any of your accounts.
- 3 Under **Activity**, click the **Download** icon in the top right — a downward arrow above a line.
- 4 Follow the steps shown in your online account:  
Choose the account you want to download  
Select file type — **QuickBooks Web Connect (QBO)**  
Select date range 01/01/[prior year] – 12/31/[prior year]  
Download
- 5 Once the file downloads, upload it in TaxDome or email it to [info@globalasi.com](mailto:info@globalasi.com)

## Bank of America

- 1 Log in to your financial institution.
- 2 Click into any of your accounts.
- 3 Under the **All Transactions** tab, click the **Download** icon in the top right, then open the dropdown.
- 4 Follow the steps shown in your online account:  
Select date range 01/01/[prior year] – 12/31/[prior year]  
Select file type – **Web Connect for QuickBooks (QBO)**, 2018 and above  
Download
- 5 Once the file downloads, upload it in TaxDome or email it to [info@globalasi.com](mailto:info@globalasi.com)

## Regions

- 1 Log in to your financial institution.
- 2 Click into any of your accounts.
- 3 Under **Activity**, click the **Download** icon in the top right.
- 4 Follow the steps shown in your online account:  
Choose the account you want to download  
Select file type – **QuickBooks Web Connect (QBO)**  
Select date range 01/01/[prior year] – 12/31/[prior year]  
Download
- 5 Once the file downloads, upload it in TaxDome or email it to [info@globalasi.com](mailto:info@globalasi.com)

## Credit Unions

- 1 Log in to your financial institution.
- 2 Open your account and find **Transaction History**.
- 3 Click the **Download** icon in the top right.
- 4 Select **Download QBO (QuickBooks)**.
- 5 Once the file downloads, upload it in TaxDome or email it to [info@globalasi.com](mailto:info@globalasi.com)

## Don't See Your Bank?

If your financial institution isn't listed above, or none of these steps match what you're seeing, call our office at **678-290-6600** or email [info@globalasi.com](mailto:info@globalasi.com). We'll walk you through it.

*Bank websites change their menus from time to time, so the exact wording may differ slightly from what is shown here. If you get stuck at any step, contact our office and we will help you complete it.*