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- 2. Click "Download Account Activities". 点击 Download Account Activity,下载账户记录。

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 Choose the File Type as "Quickbooks Web Connect (QBO), Activity "Choose a date range". 请确认在<u>下载格式(File Type)</u>处选择格式为: QuickBooks Web Connect(QBO) 请确认在<u>账户(Account)</u>处选择您正确尾号的账户。 请确认在日期(Date)处选择您所需要导出的账单的时段。

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	Choose an account, then the type of file and activity that you'd like to download. $oldsymbol{\Theta}$	
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	Financial Software Access	
	You can use Direct Access to pay bills and see activity using financial management software for most of your Chase accounts. Please see our Einancial Software Access page for more	

 Send the QBO file and the bank statements to <u>INFO@CHEN.CPA</u>. 将您下载好的 (.QBO)结尾的文件和同时段的 Bank <u>Statement 发送给 INFO@CHEN.CPA</u>.



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- **1.** Login your online account, then goes to account activities. 登录您的银行网银,点击进入需要导出账单的账户。
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10/20/2020	Add this deal Earn 10% cash back on your Casper.com purchase! America's Best mattress brand.	<u>}</u>	-	
	Beginning balance as of 10/20/2020			\$107.97
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3. 请确认在下载格式(File Type)处选择格式为: WEB Connect for QuickBooks 2018 and Above (QBO)

请确认在日期(Custom Date Range)处选择您所需要导出的账单的时段

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Newest Ne:	NOTE:	Quicken and Managing Your Money - QIF file (2 digit)
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	2. Support for Quicken 2017	Microsoft Excel Format or
	above.	Spreadsheet - tab delimited text format
	3. You can download up to 3,	Spreadsheet - pipe delimited text format
		Spreadsheet - space delimited text format
	l	Printable text format

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下载 QBO 格式的银行账单-CITI

- 1. 登录您的银行网银,点击进入需要导出账单的账户。
- 2. 找到您的银行/信用卡活动明细的上方
- 3. 请确认在时间 段(Time Period) 处选择"Date Range"
- 4. 请确认在交易类型(Transaction Type)处选择 "All",在 "From" 填写您想下载时段的第一天,和 "To"选择您想下载的时段最后一天,然后点击 "Apply(应用)"
- 5. 然后再点击 "Export (导出)"

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6.	在导出类型选择"QBO-QuickBooks",然后点击"Export(导出)"

○ CSV - Spreadsheet	🔿 TXT - Plain Text
Financial software	
O QFX - Quicken	QBO - QuickBooks
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	Export

7. 将您下载好的 (.QBO)结尾的文件和一样时段的 Bank <u>Statement 发送给我们到</u> <u>INFO@CHEN.CPA</u>.



下载 QBO 格式的银行账单-US Bank

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- 2. 点击 Download Transactions,下载银行账户记录。

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	Set up Cards for Travel	Download To
	Find Past Check or Depo	Select & Download Time
	Order/Review Checks	Microsoft Excel (CSV)
	Lost or Stolen Card/Chec Reset debit or ATM card F	CK Quicken 2004 of Newer (QFA) Quicken 2003 of Older (QIF)
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