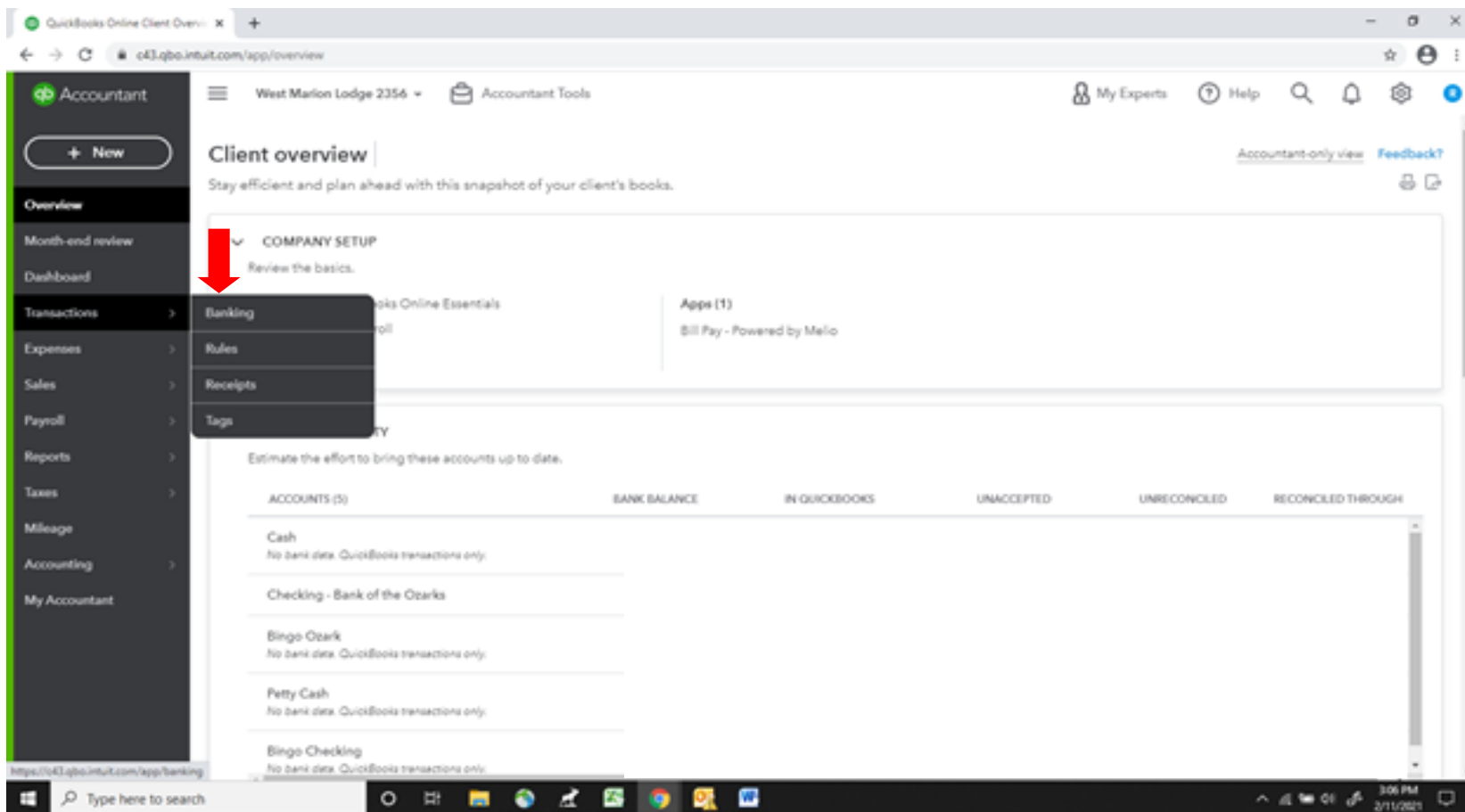


# How to Unlink a Bank Account

1. Select Transactions—Banking from Side Menu (note: names and accounts have been blocked for protection)



## How to Unlink a Bank Account

2. On the Banking page—Select the Pencil icon in the upper left of the Checking Account box

The screenshot shows the 'Accountant Tools' interface. The left sidebar contains navigation options: Overview, Month-end review, Dashboard, Transactions (selected), Expenses, Sales, Payroll, Reports, Taxes, Mileage, Accounting, and My Accountant. The main content area is titled 'Banking' and shows a transaction card for '1005.00 Cash:Checking - Bank of the ...'. A red arrow points to a pencil icon in the top right corner of this card. Below the card, there are filters for 'For review (62)', 'Categorized', and 'Excluded'. A search bar is present with the text 'Search by description or check number'. At the bottom, a table lists transactions with columns for DATE, DESCRIPTION, AMOUNT, and ASSIGN TO. The table shows three rows of transactions, each with a 'Review' button and a 'Confirm' button.

DATE	DESCRIPTION	AMOUNT	ASSIGN TO
02/09/2021	CHEQ		
02/09/2021	CHEQ		
02/09/2021	CHEQ		

## How to Unlink a Bank Account

3. Select Edit account info button in the *Checking Account* box

The screenshot displays the QuickBooks Accountant web interface. The left sidebar contains navigation options: Overview, Month-end review, Dashboard, Transactions (highlighted), Expenses, Sales, Payroll, Reports, Taxes, Mileage, Accounting, and My Accountant. The main content area shows a transaction for '1005.00 Cash:Checking - Bank of the ...'. A modal box is open over this transaction, containing two buttons: 'Edit sign in info' and 'Edit account info'. A red arrow points to the 'Edit account info' button. The interface also includes a 'Link account' dropdown, an 'Update' button, and a table of transactions with columns for DATE, DESCRIPTION, AMOUNT, and ASSIGN TO. The table shows three transactions: two checks dated 02/09/2021 and one deposit. The bottom of the screen shows the Windows taskbar with the search bar and system tray.

DATE	DESCRIPTION	AMOUNT	ASSIGN TO
02/09/2021	CHECK 7		Records found (11)
02/09/2021	CHECK 7		
02/09/2021	DEPOSIT		

## How to Unlink a Bank Account

3. Click the box for Disconnect this account on save and then click on the Save and Close button.

