

QUICK BOOKS – SWITCHING FROM CLASSIC VIEW TO EXPRESS VIEW

Quickbooks Desktop Instructions:

Need to see additional information in Quickbooks about your imported transactions?

The “Memo” field contains additional information about the transaction. The “Memo: field is not shown in the Banking "Classic View". Users can switch to the "Express Mode" to be able to toggle the Show Bank Memo option on/off.

This QuickBooks link will show how to switch banking modes:

<https://quickbooks.intuit.com/learn-support/en-us/bank-feeds/switch-between-banking-modes/00/203416>

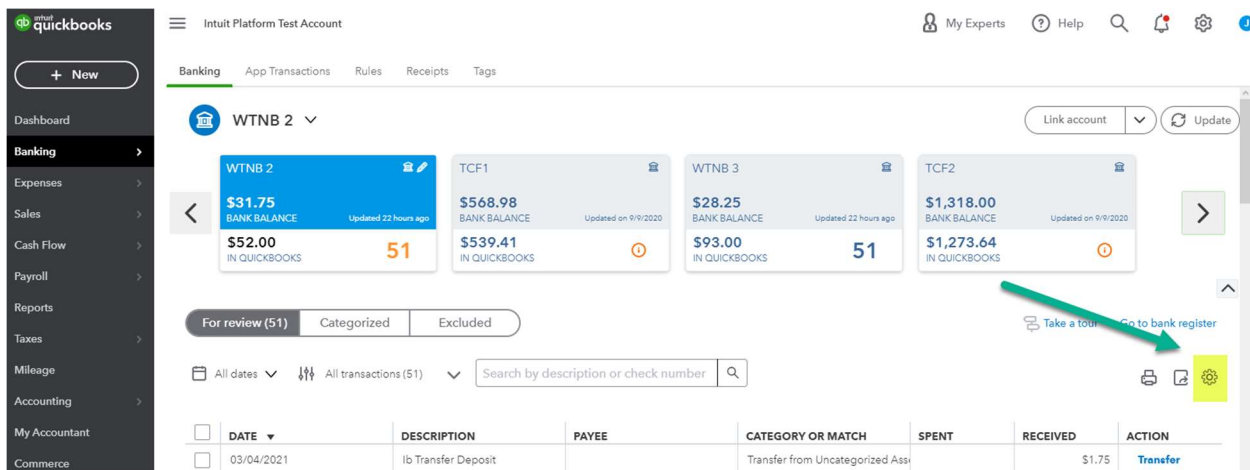
Quickbooks Online Instructions:

Need to see additional information in Quickbooks about your imported transactions?

The “Memo” field contains additional information about the transaction. The “Memo: field is not shown in the Banking "Classic View". Users can switch to the "Express Mode" to be able to toggle the Show Bank Memo option on/off.

Follow these easy steps below:

In QuickBooks Online go to Banking > Select the Cog Wheel and check the box for Show Bank Details.



The screenshot displays the QuickBooks Online Banking interface. On the left is a navigation sidebar with options like Dashboard, Banking, Expenses, Sales, Cash Flow, Payroll, Reports, Taxes, Mileage, Accounting, My Accountant, and Commerce. The main area shows a 'Banking' section for 'Intuit Platform Test Account' with tabs for Banking, App Transactions, Rules, Receipts, and Tags. It features four account balance cards: WTNB 2 (\$31.75), TCF1 (\$568.98), WTNB 3 (\$28.25), and TCF2 (\$1,318.00). Below these are filters for 'For review (51)', 'Categorized', and 'Excluded'. A search bar is present with the text 'Search by description or check number'. At the bottom, a table shows transaction details with columns for DATE, DESCRIPTION, PAYEE, CATEGORY OR MATCH, SPENT, RECEIVED, and ACTION. A green arrow points to a settings gear icon in the bottom right corner of the interface.

DATE	DESCRIPTION	PAYEE	CATEGORY OR MATCH	SPENT	RECEIVED	ACTION
03/04/2021	lb Transfer Deposit		Transfer from Uncategorized Ass		\$1.75	Transfer



Columns

- Check No.
- Payee

\$18.00

Groups

- Turn on grouping

Transaction details

- Show amounts in 1 column
- Editable date field
- Copy bank detail to memo
- Show suggested rules
- Show bank details
- Enable suggested categorization

\$1.00

\$1.00 Page Size

50