



Connecting Your Accounting Software to Unity Trust Bank

A step-by-step guide for integrating your Unity Trust Bank account with QuickBooks.



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Quickbooks Accounting

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What you'll need:

Before you begin, make sure you have the following to hand. This will ensure a smooth connection process.

Tip: Setup must be done on desktop. Mobile apps currently have limited functionality for bank feed connections.

Your accounting software account

- **QuickBooks:** You can connect via desktop or mobile, though desktop offers a fuller experience.
- **Third party:** You will need access to the Token.io app to proceed.
- **Please check:** Please check that your bank account details are correct in Token before starting the connection process.

Unity Trust Bank Online Banking

- Email address and password for your Unity Trust Bank Online Banking.
- Access to your registered mobile number for security verification.

Token app (if not already installed)

- Token is the secure service that links your bank account to your accounting software.
- Download and install the Token.io app from your app store (iOS or Android).
- You'll need to set up your Token account and link your Unity Trust Bank account before connecting it to QuickBooks.

Internet connection & device

- A reliable internet connection.
- Access to a desktop/laptop for setup (recommended). Mobile apps can be used for approvals or quick checks.



Connecting to Token.io

Token.io will allow you to connect your Quickbooks account to your Unity Trust account.

ⓘ **Connecting to Token.io**

You will need to connect to Token.io app to integrate your Unity Trust Bank account with QuickBooks.

🔒 **Why Token.io?**

Security-first: FCA-regulated and bank-approved.

No credentials shared: Token uses encrypted, permissioned connections.

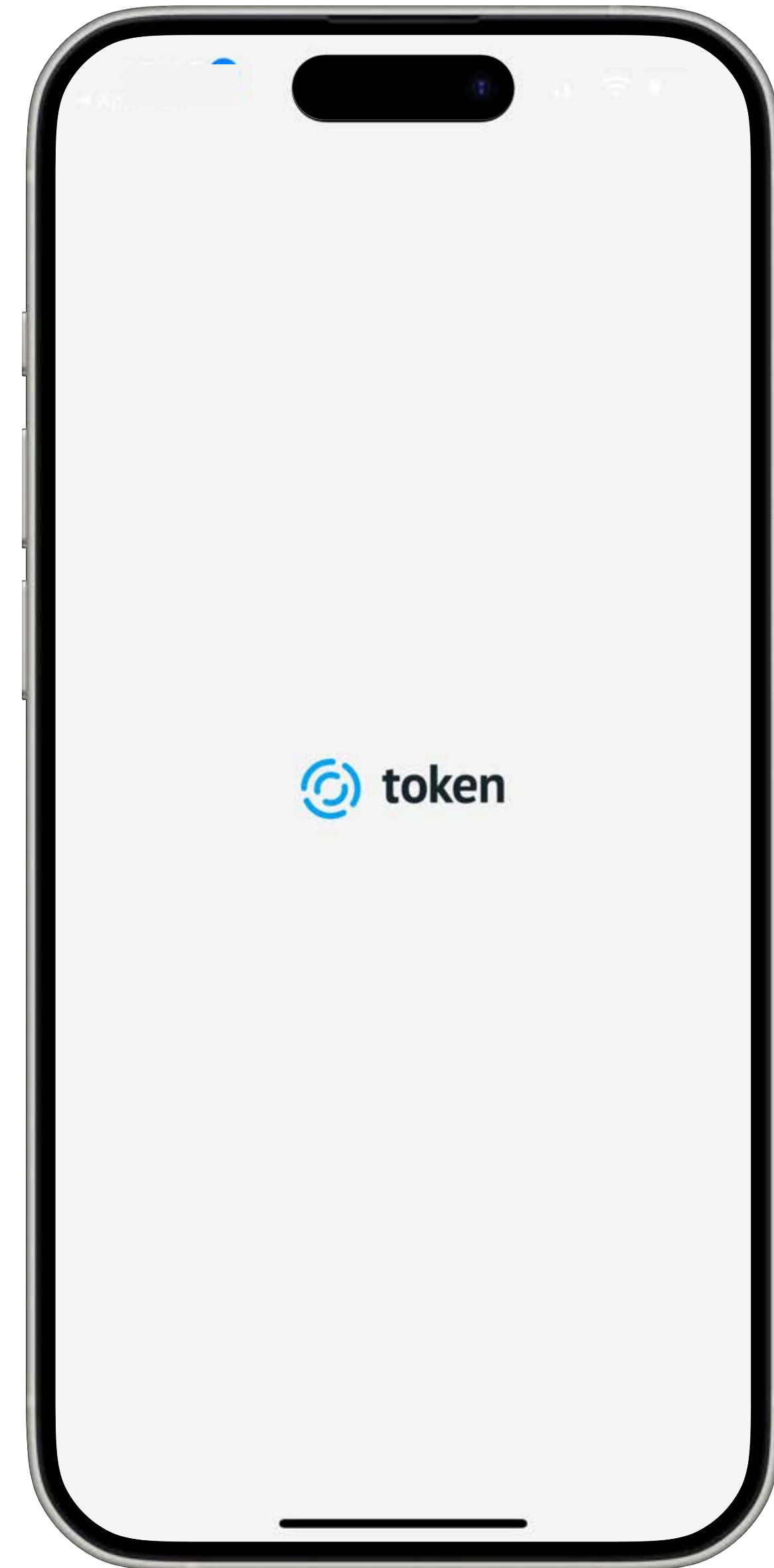
Convenience: Seamless connection between bank and software.



Do I need to link my Unity account in Token before connecting in QuickBooks? Yes!

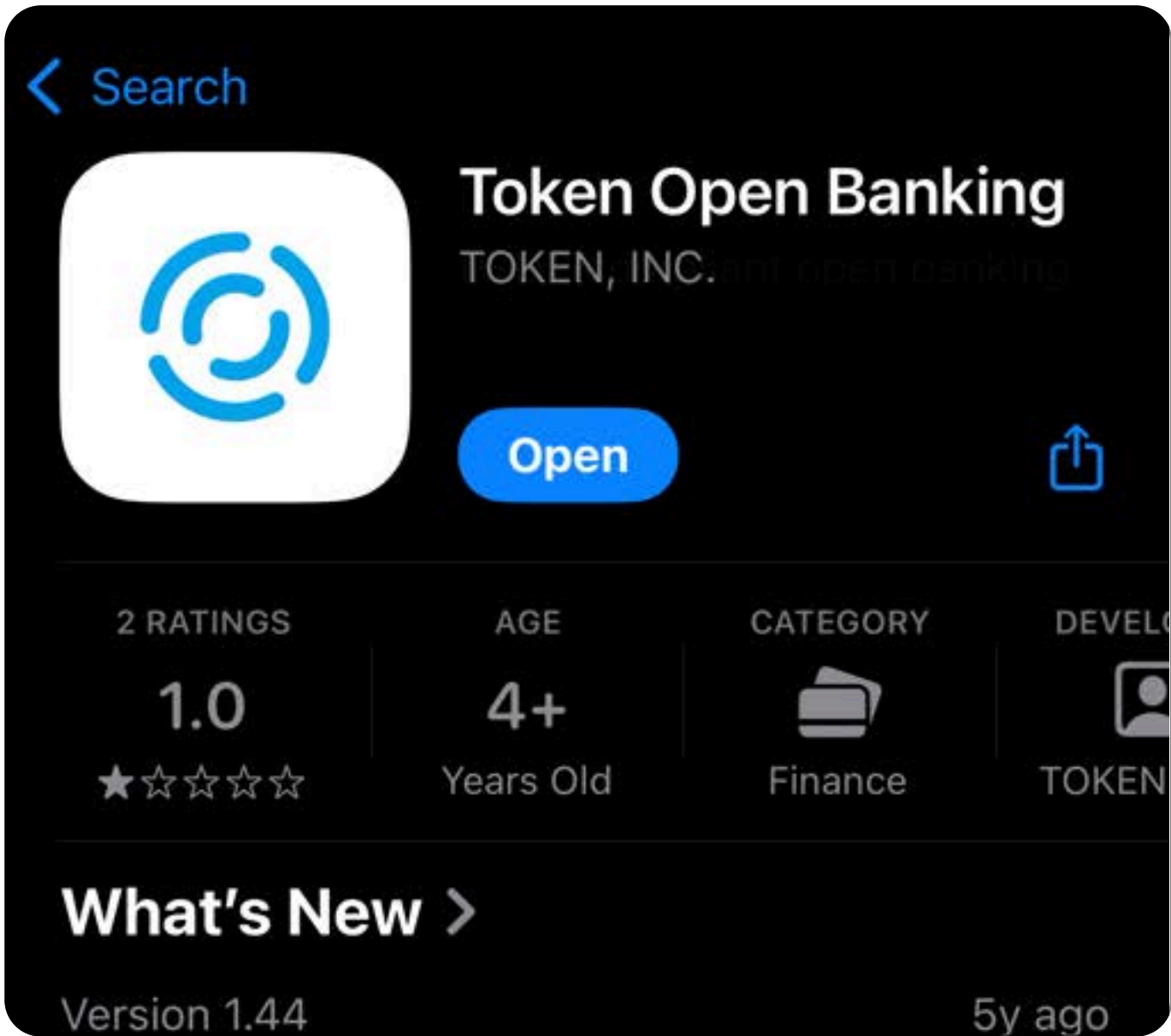
If your Unity Trust Bank account is not already linked to Token.io, then you will not be able to complete the connection from QuickBooks. Here's why:

- 🌀 The accounting software triggers a redirect to Token.io to request authorisation
- 🌀 Token checks whether you've already granted access to your Unity account.
- 🌀 If Token doesn't already have access to that Unity account (via open banking consent), the process will fail.



Step 1: Download the Token App

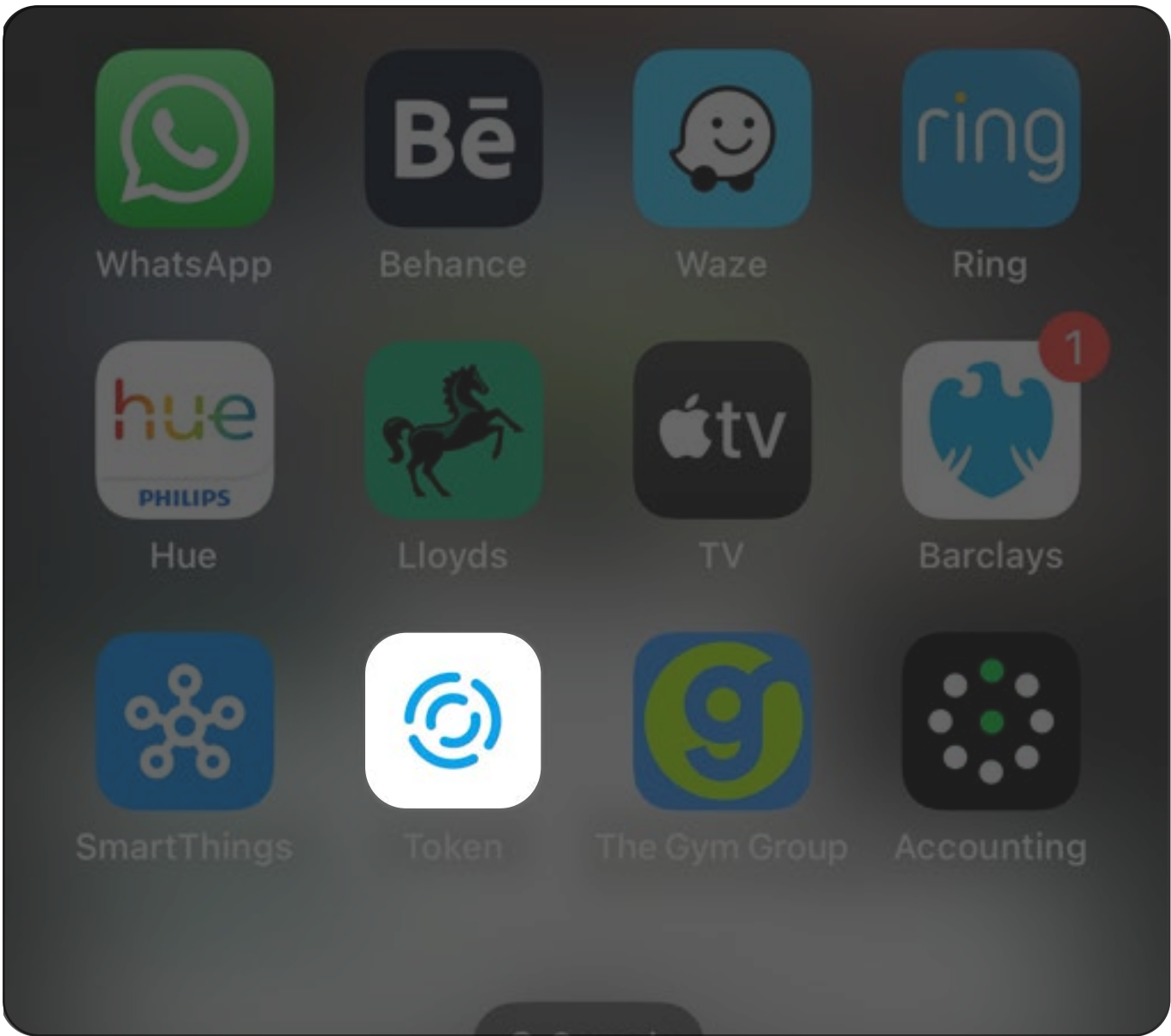
Since Token handles the secure connection, you'll need the Token mobile app installed.



Download the App

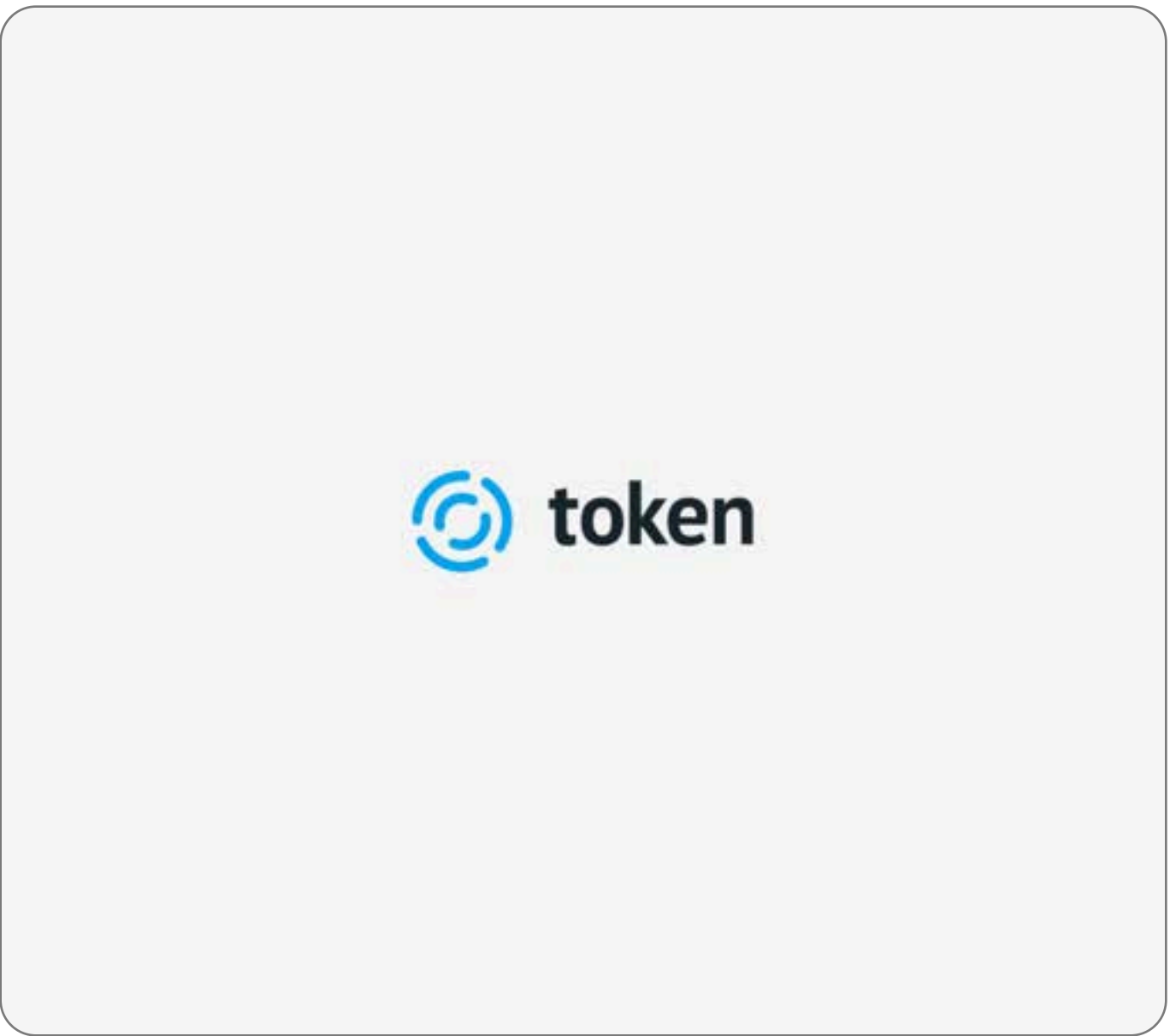
Go to your App Store:

- [Apple App Store – Token](#)
- [Google Play Store – Token](#)



Install the App

You can easily find the app on your phone by searching for Token in your phones search bar function.

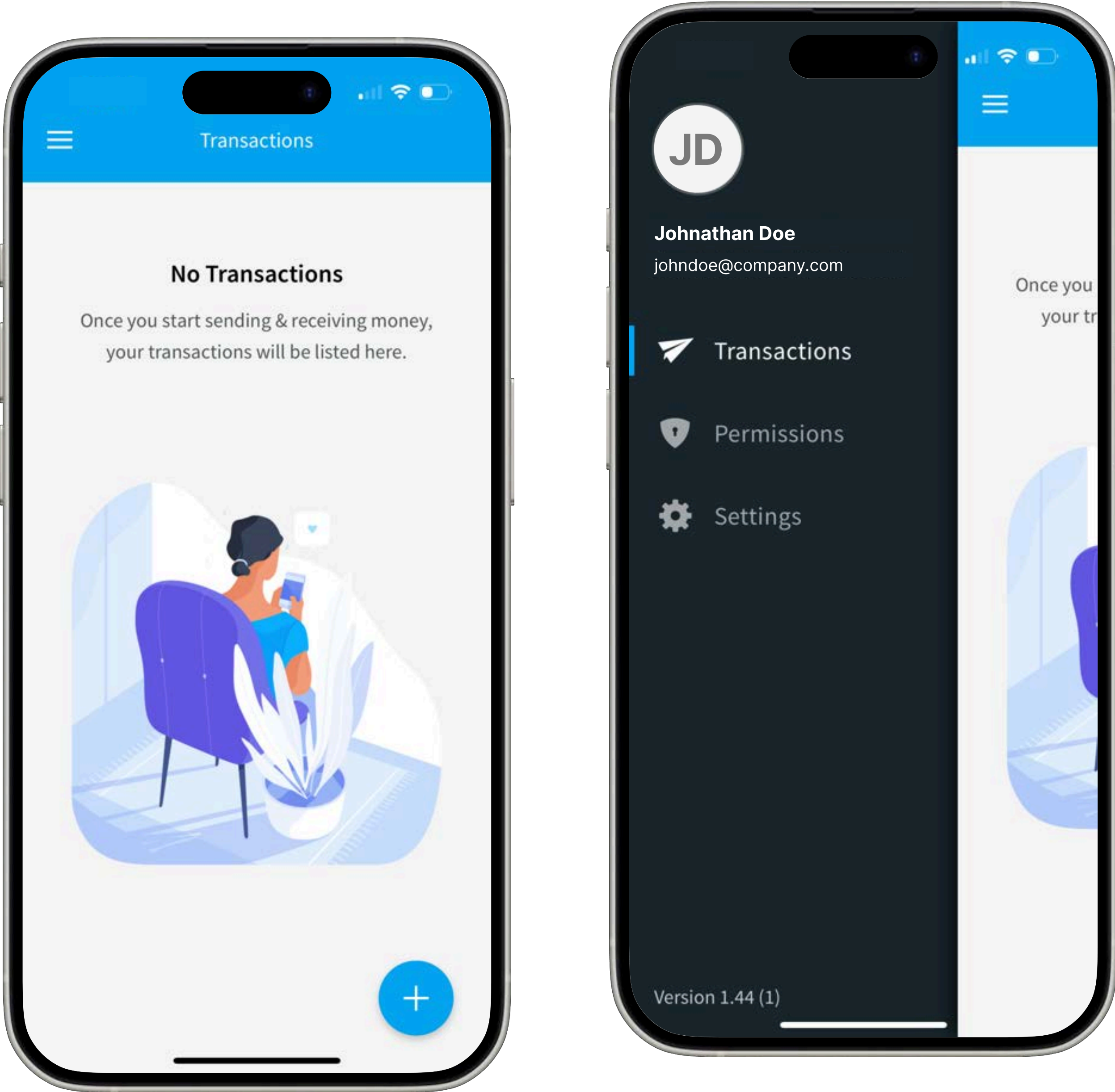


Login to the App

Install and open the app on your phone (you'll log in or create an account as part of the journey).

Before you connect to Token.io

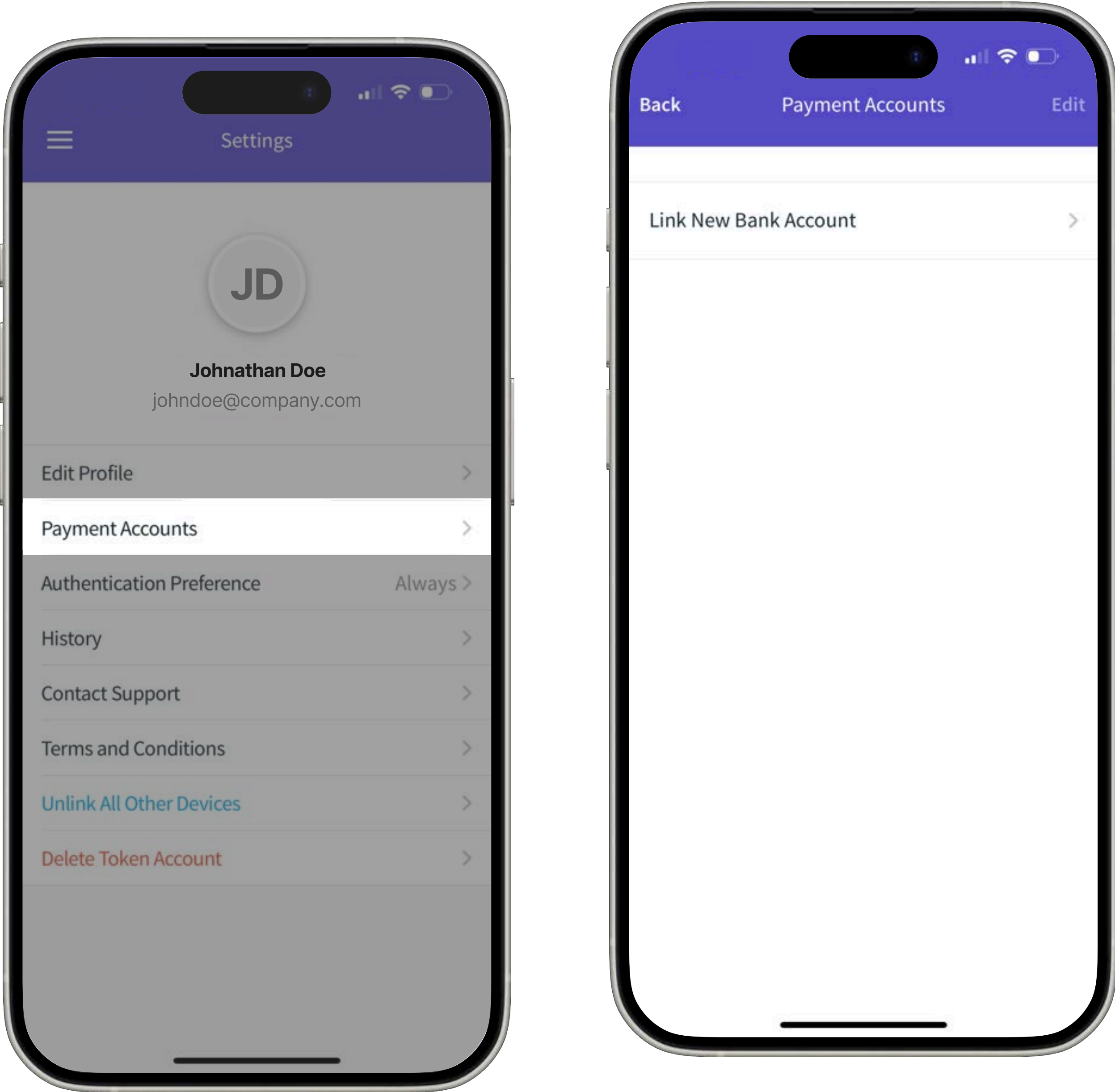
You may be prompted prior to landing on the **‘Transactions’** screen to **‘Link a Bank’**. For the purpose of this document we have chosen to skip the onboarding process and link our bank account manually by selecting the menu icon in the top left and selecting the **‘Settings’** tab.



Linking your Unity Trust Bank account to Token.io

When on the 'Settings' page within the Token app, click 'Payment Accounts'.

Tip: Once you add your account you'll be able to edit the account. **(The edit option in the top right only allows you to delete the selected account).**

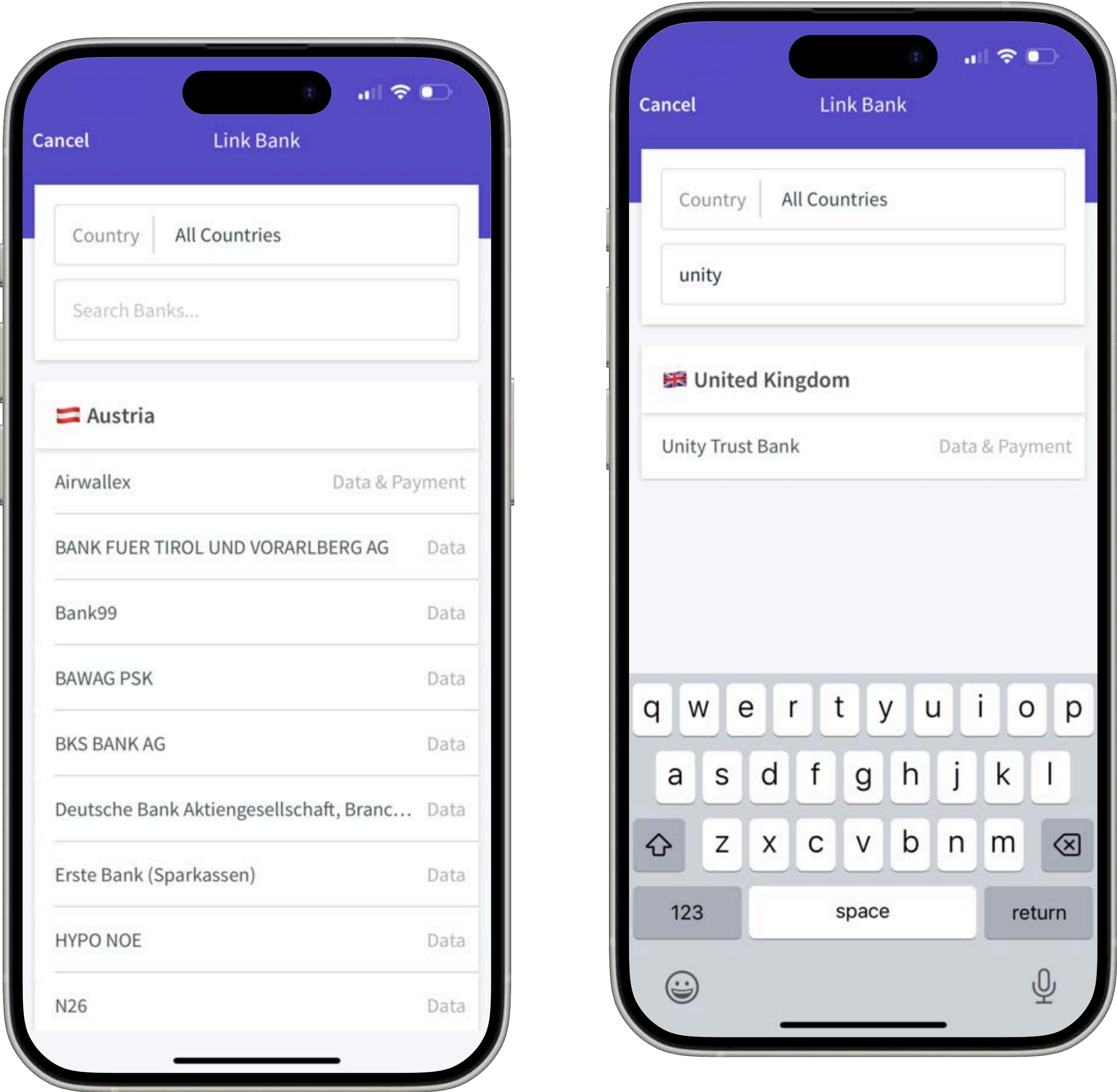


Link Your Bank in Token

To begin the secure connection process, you'll be asked to search for and select your bank within the Token app.

This allows Token to initiate a secure connection flow with Unity Trust Bank, where you'll log in and grant consent for sharing account information with your chosen accounting software.

Tip: Make sure you select the correct version of your bank (e.g., business vs personal, if options are listed), and double-check the name spelling.

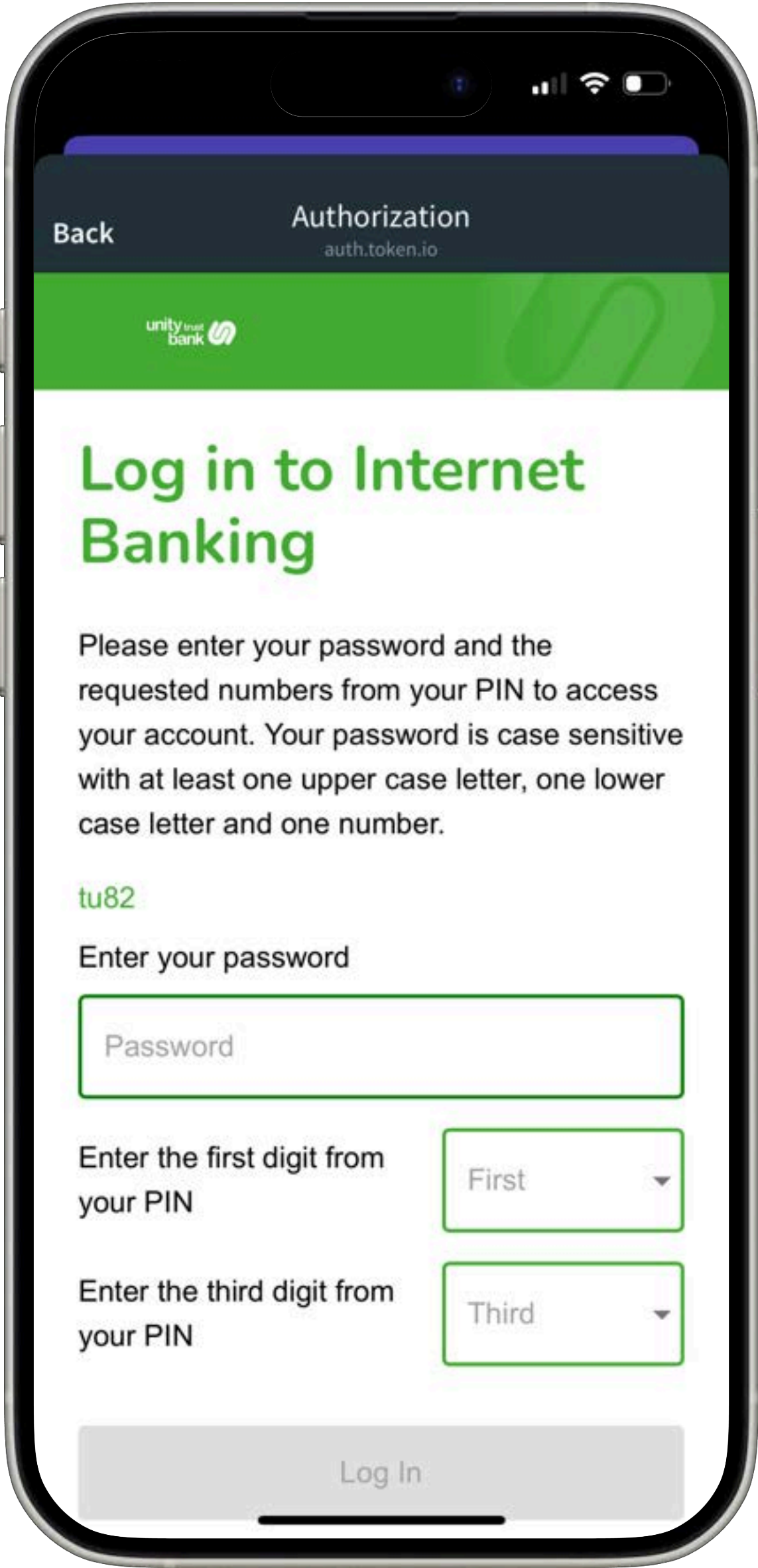
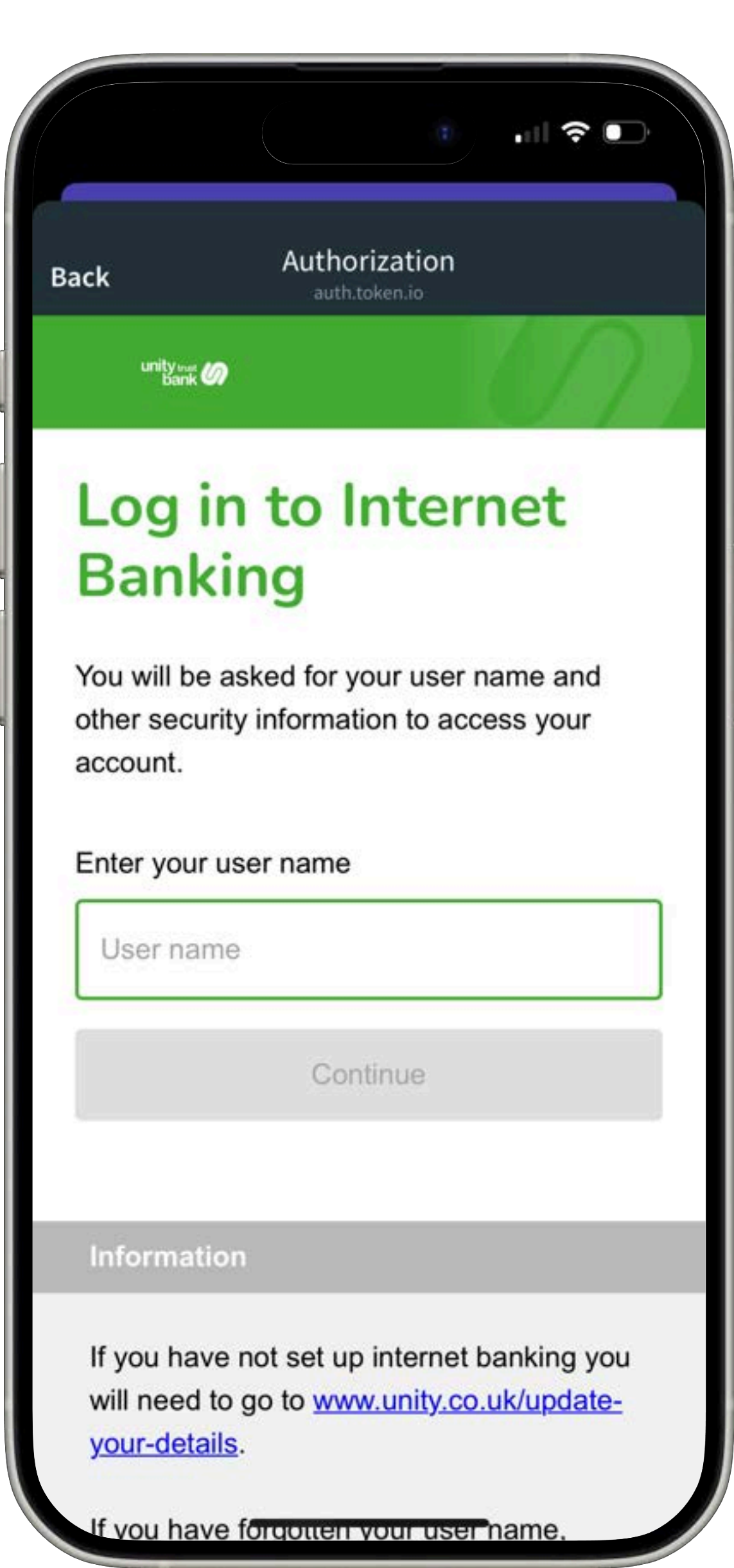


Unity Trust Bank Authentication via Token

To securely connect your Unity Trust Bank account, you'll be redirected to a Unity Trust Bank login screen within the Token platform. This step confirms your identity and ensures that you're authorising access to your account.

Tip: If you have multiple Unity accounts, make sure you're using credentials for the account you want to link to QuickBooks.

These are the same login details you use when signing in to Unity Trust Bank's Online Banking.

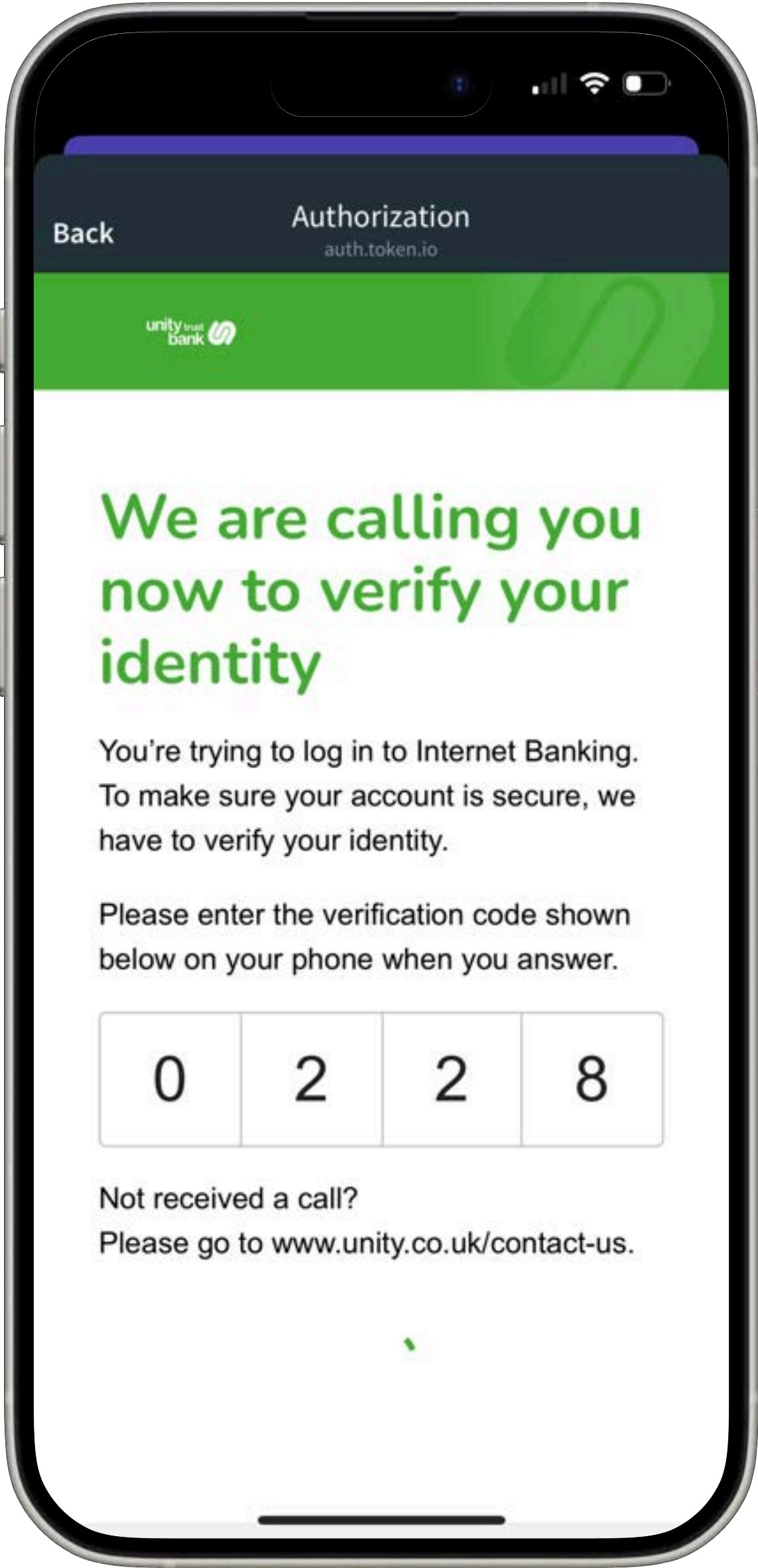
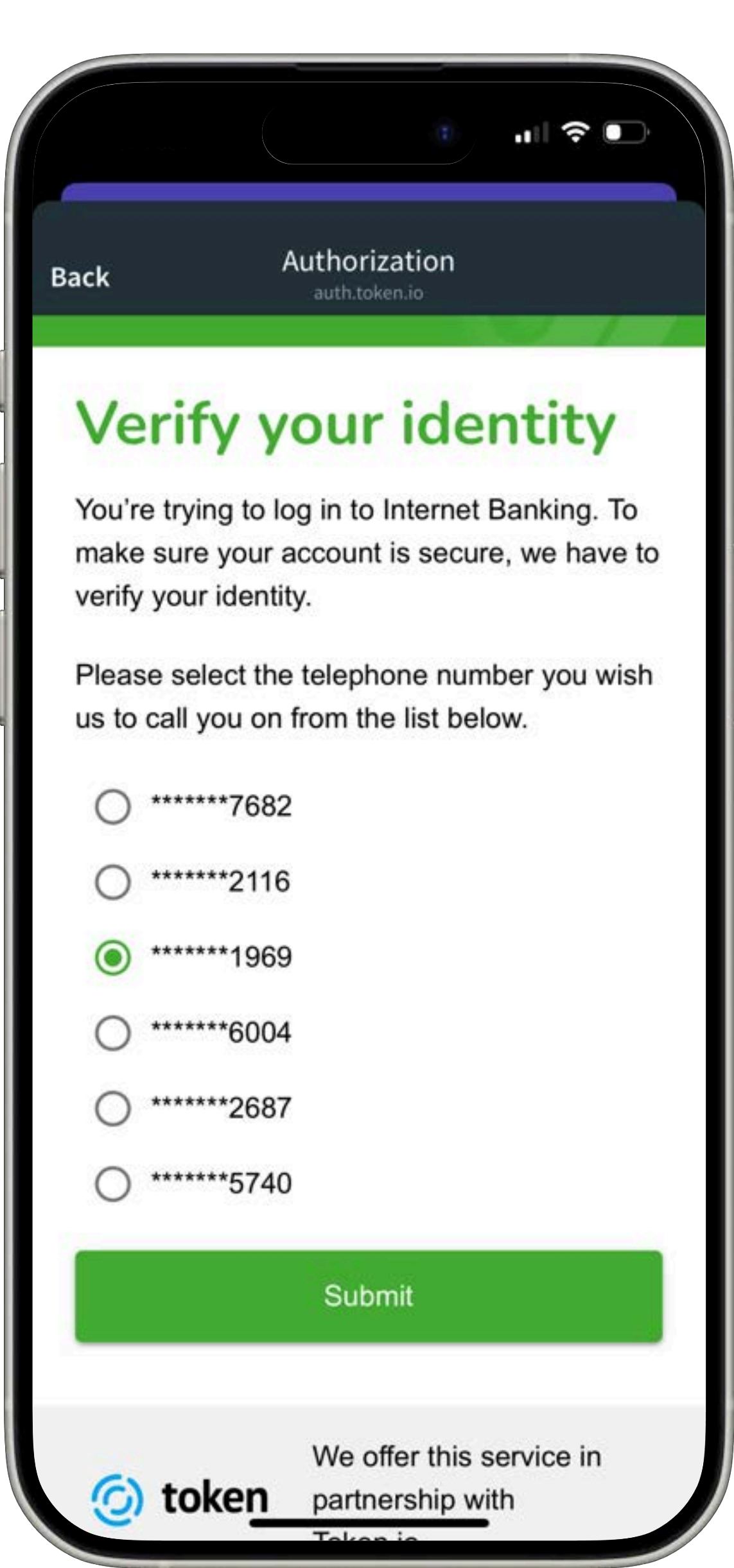


Identity Verification via Phone Call

As part of the secure login process, Unity Trust Bank will now ask you to verify your identity using your registered phone number.

- Select the number that matches the phone number registered with Unity Trust Bank.
- Once selected, you will receive an automated phone call from Unity Trust Bank.
- During the call, you will be asked to verify a 4-digit code displayed on your Token App screen.

This step ensures that only the account holder can authorise the connection — adding an extra layer of security to your account linking process.

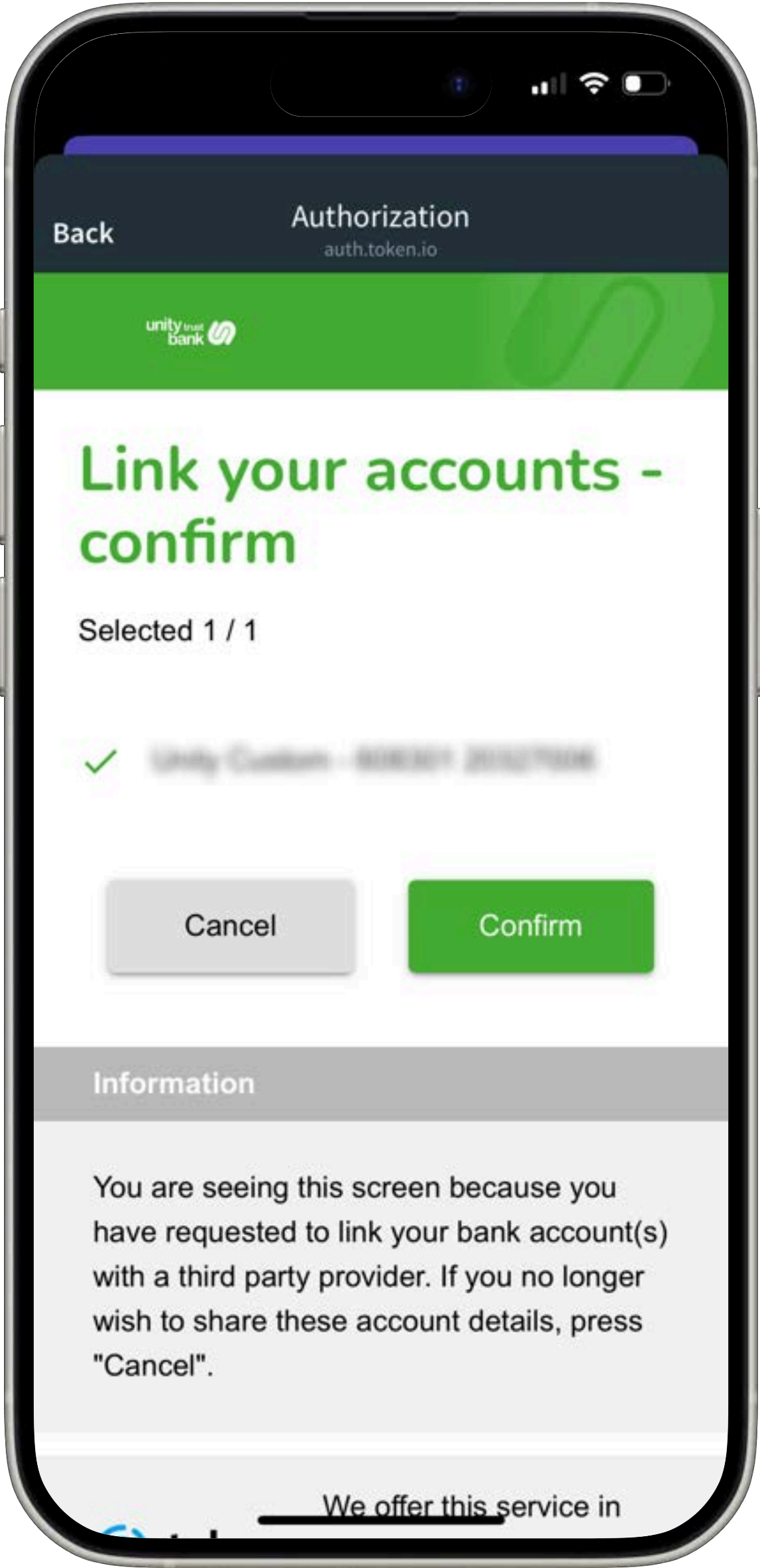
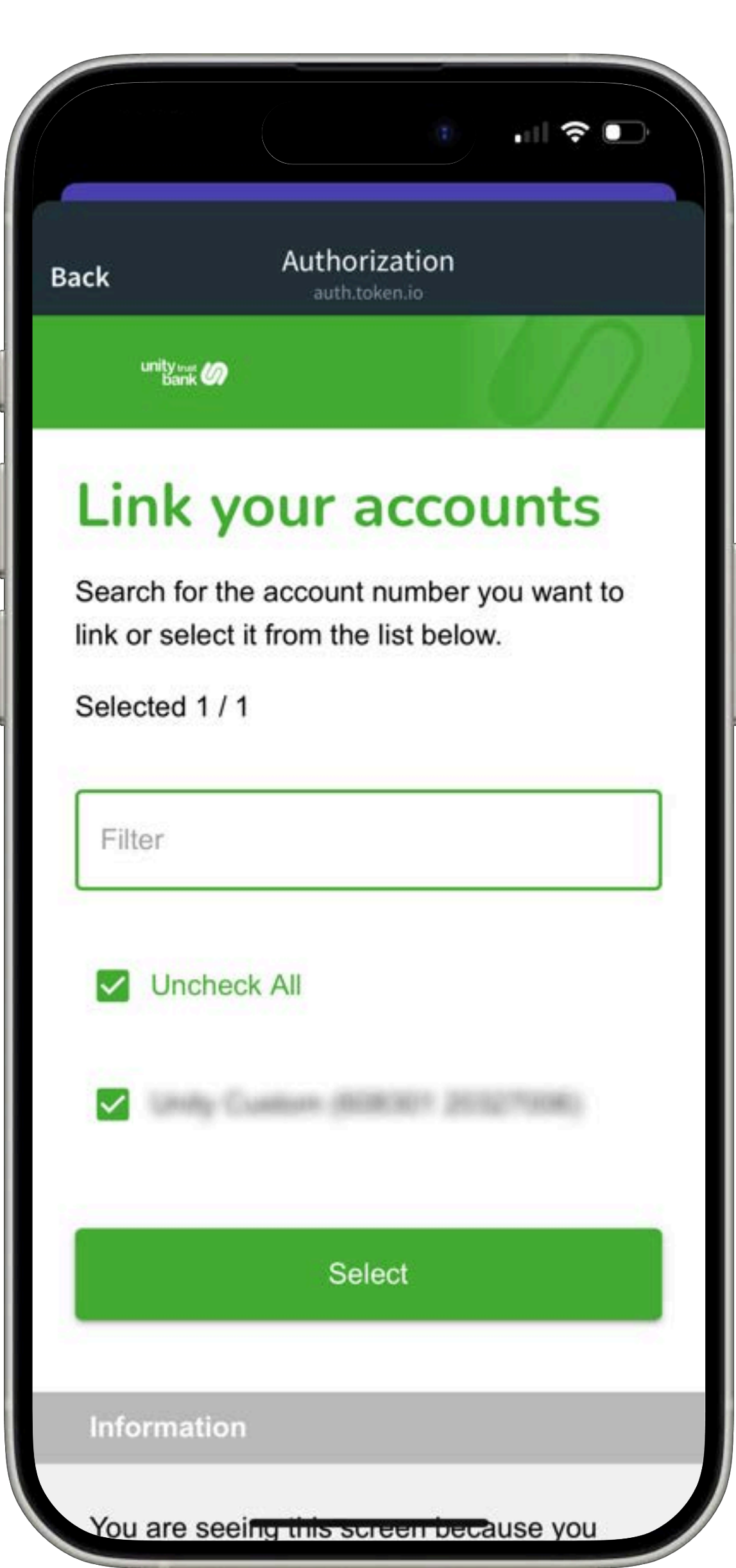


Select Your Bank Accounts to Link

You're now ready to choose which Unity Trust Bank accounts you'd like to link to your accounting software through Token.

- You'll see a list of your available Unity Trust Bank accounts
- Use the search bar at the top to quickly find specific accounts by name or number.
- During the call, you will be asked to verify a 4-digit code displayed on your Token App screen.

This ensures only the accounts you choose will be connected and visible in Quickbooks.

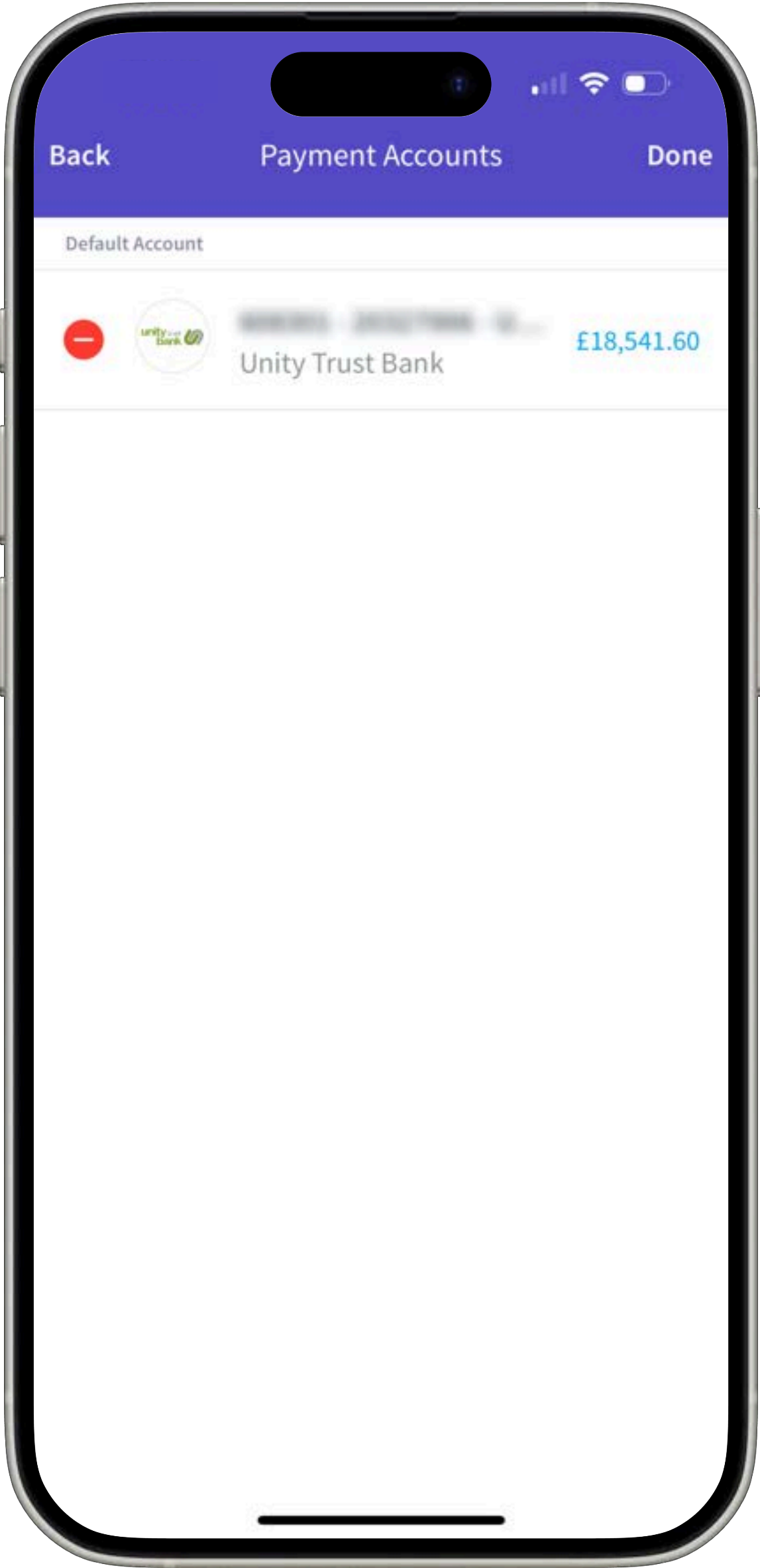
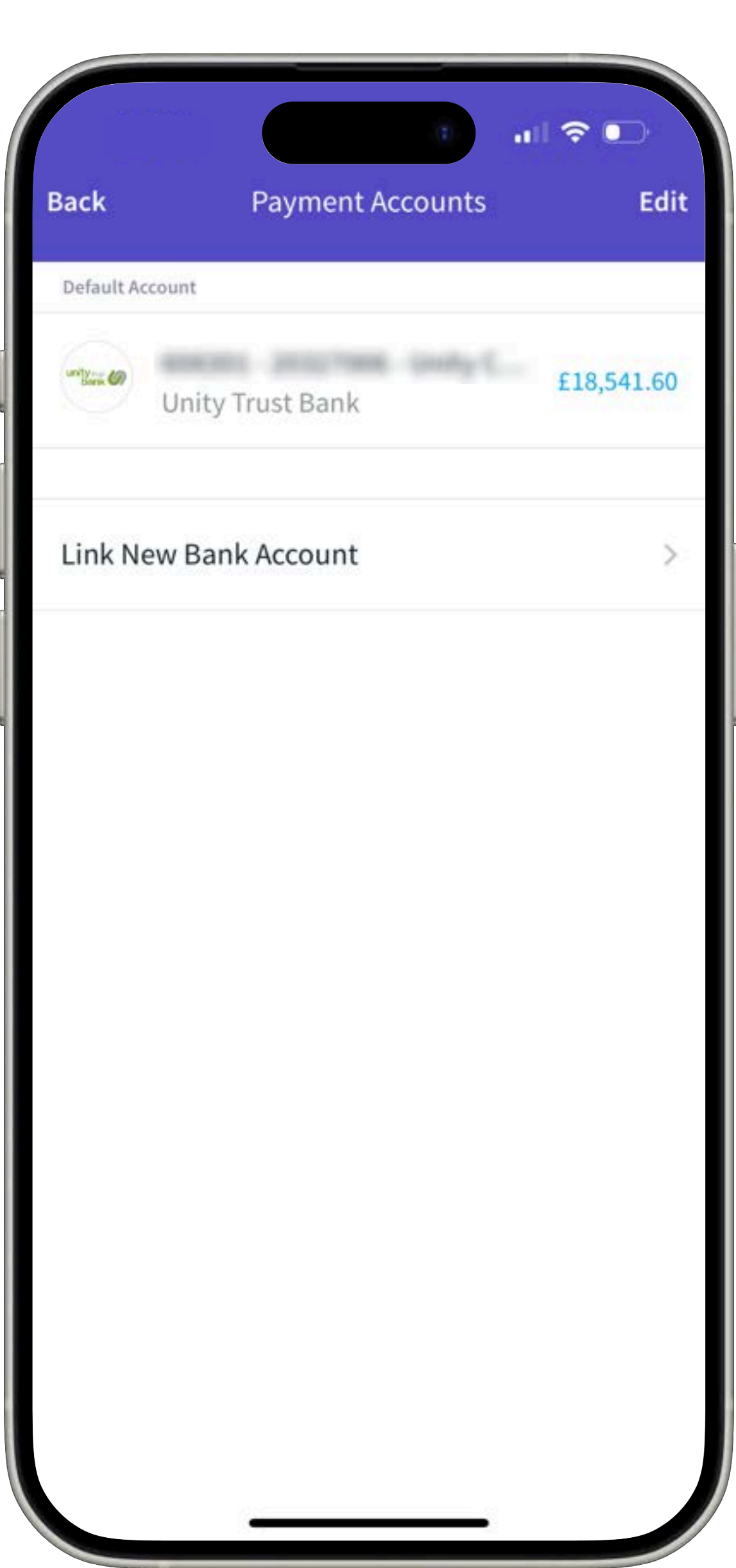


You Account is now Linked Successfully

Your selected Unity Trust Bank account(s) are now securely connected to Token.

- You’ve completed the authentication and consent process.
- Your linked accounts are now visible within the Token app.
- These accounts can now be connected to QuickBooks for transaction syncing and reconciliation.

Tip: Regularly review your linked accounts in Token to ensure only the accounts you actively use for business accounting are connected.



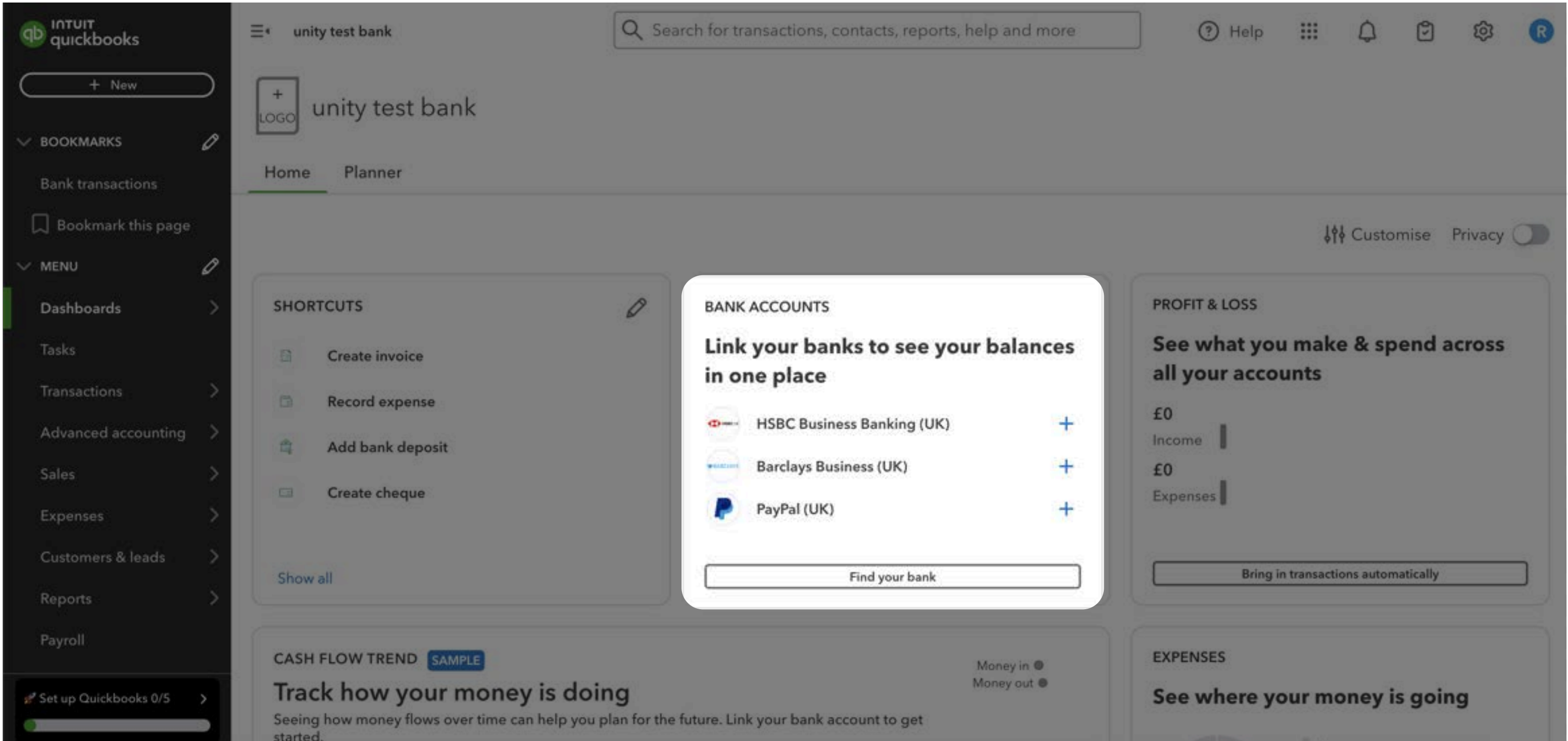


Connecting Your Unity Trust Bank Account to QuickBooks Desktop App via Token

This section will guide you step by step through the desktop setup process.

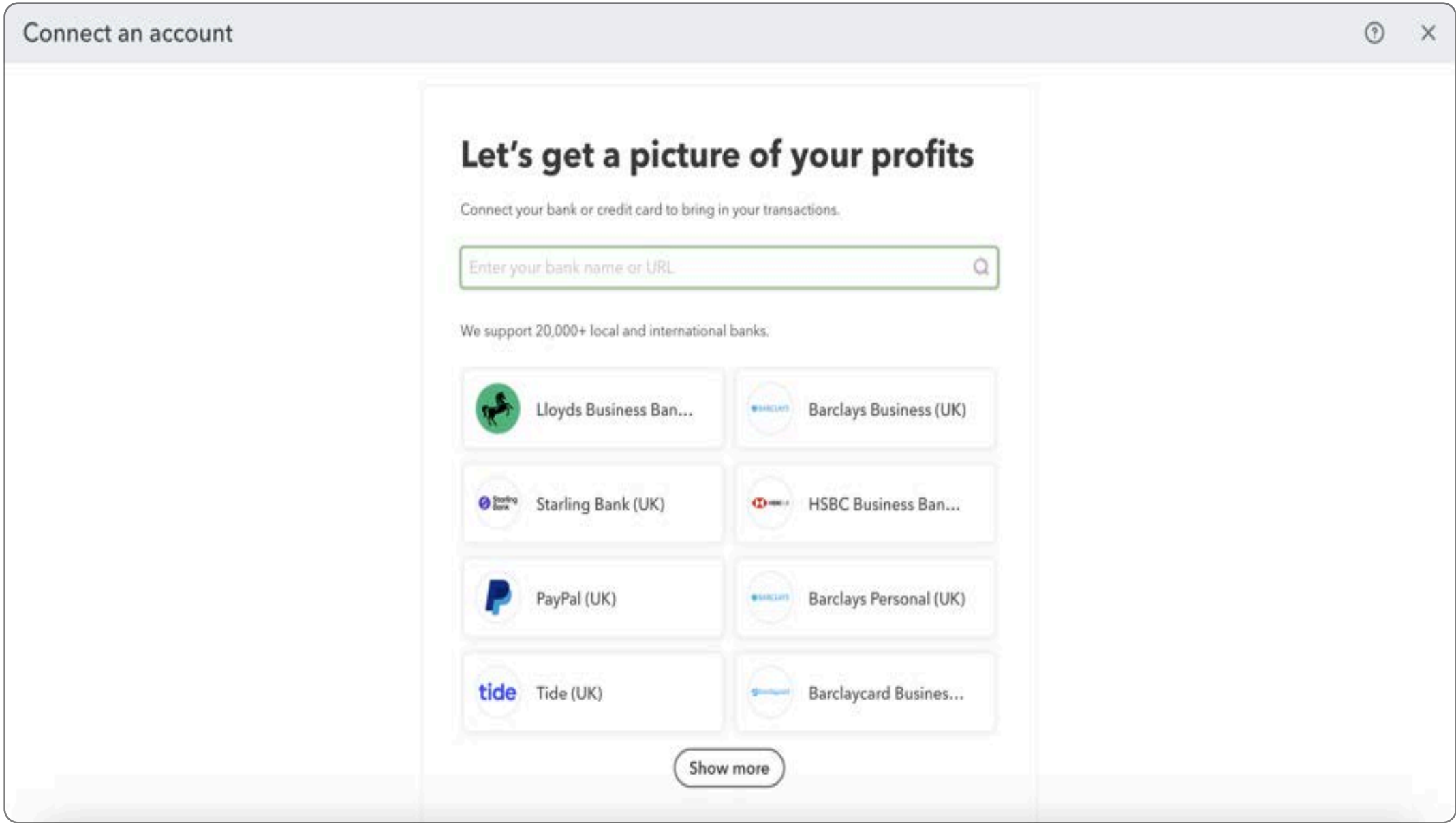
Step 1: How to Connect Unity to Quickbooks

Select the newly added account to view more information



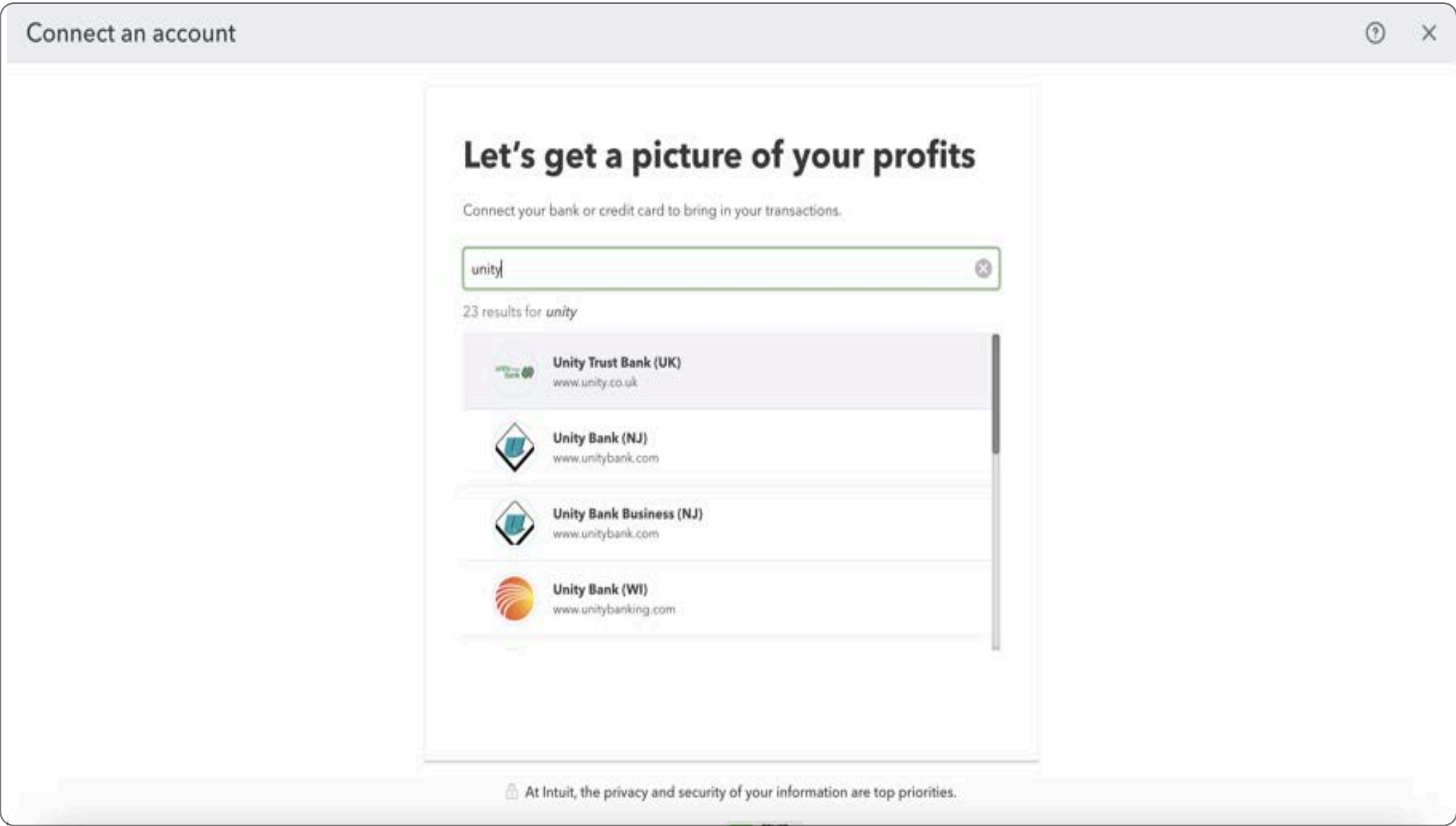
Step 2: Finding Unity Trust Bank

Tip: This can be done either on mobile or desktop.



Search for Unity

Using the search bar at the top of the page, type Unity Trust Bank and results will appear.

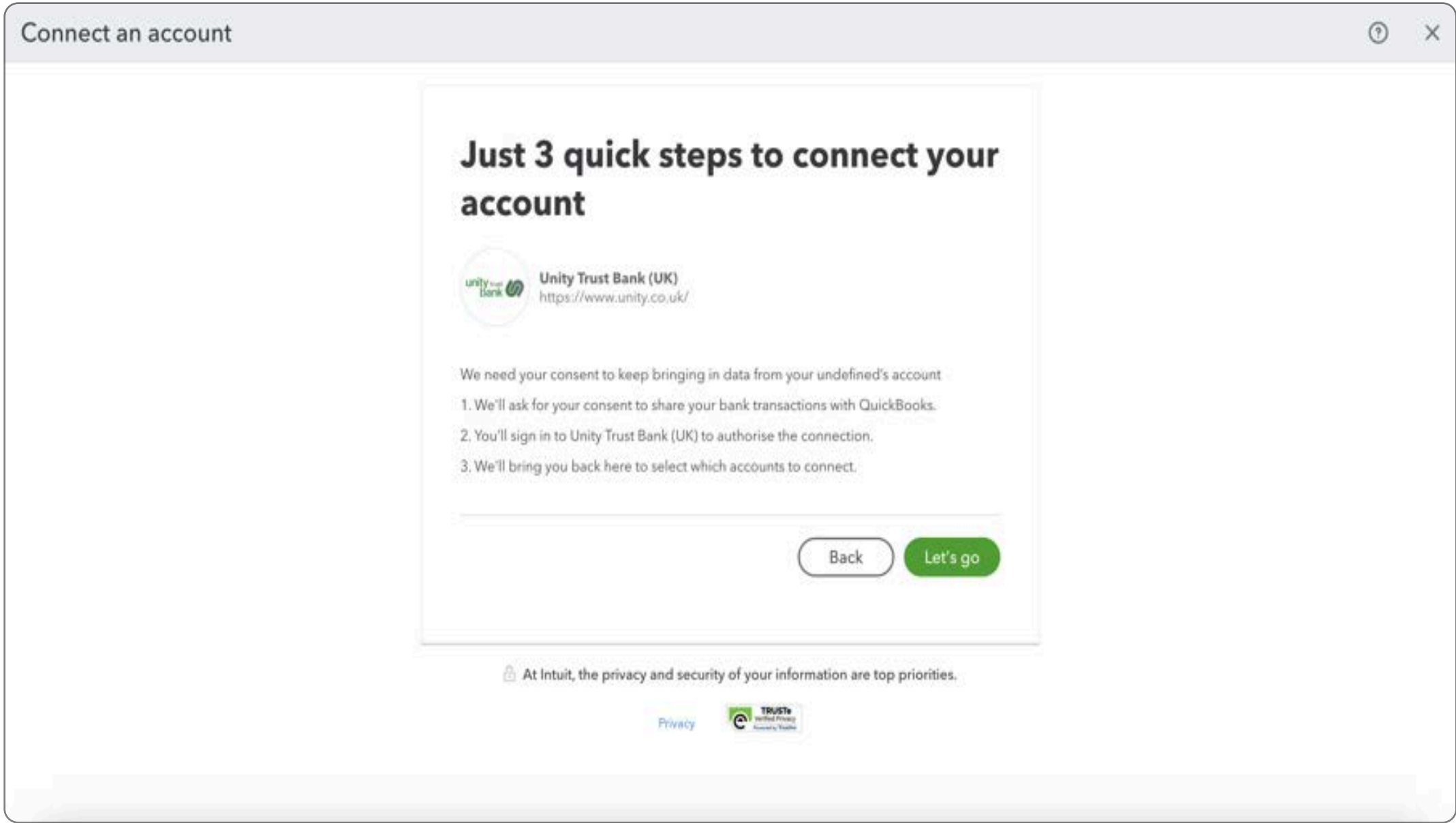


Select the correct Unity

If you only type 'Unity' in the search bar you may be presented with more than one Unity Bank. To be sure type our full name in the search bar.

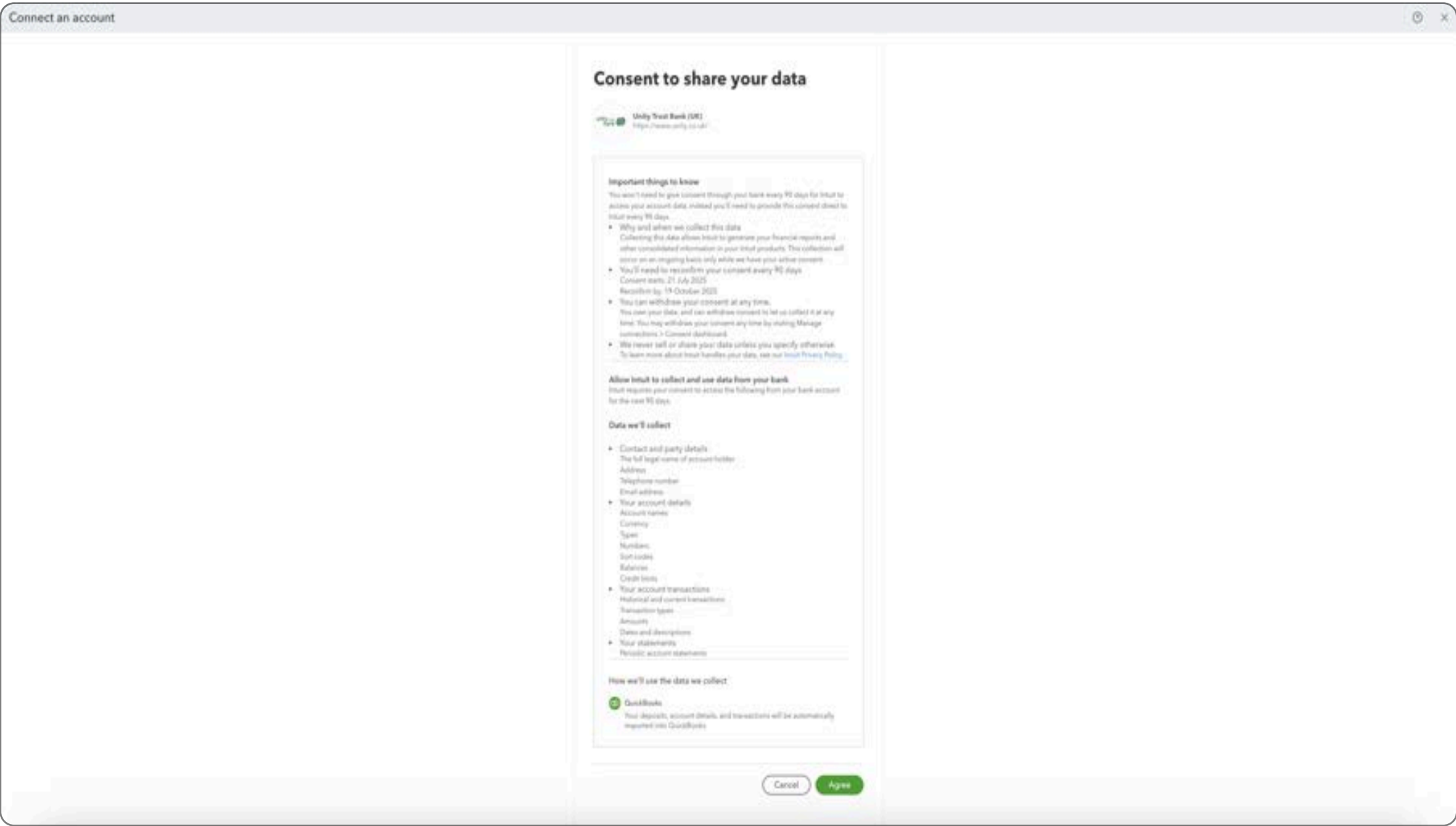
Step 3: Give your consent

Tip: This can be done either on mobile or desktop.



Let's go

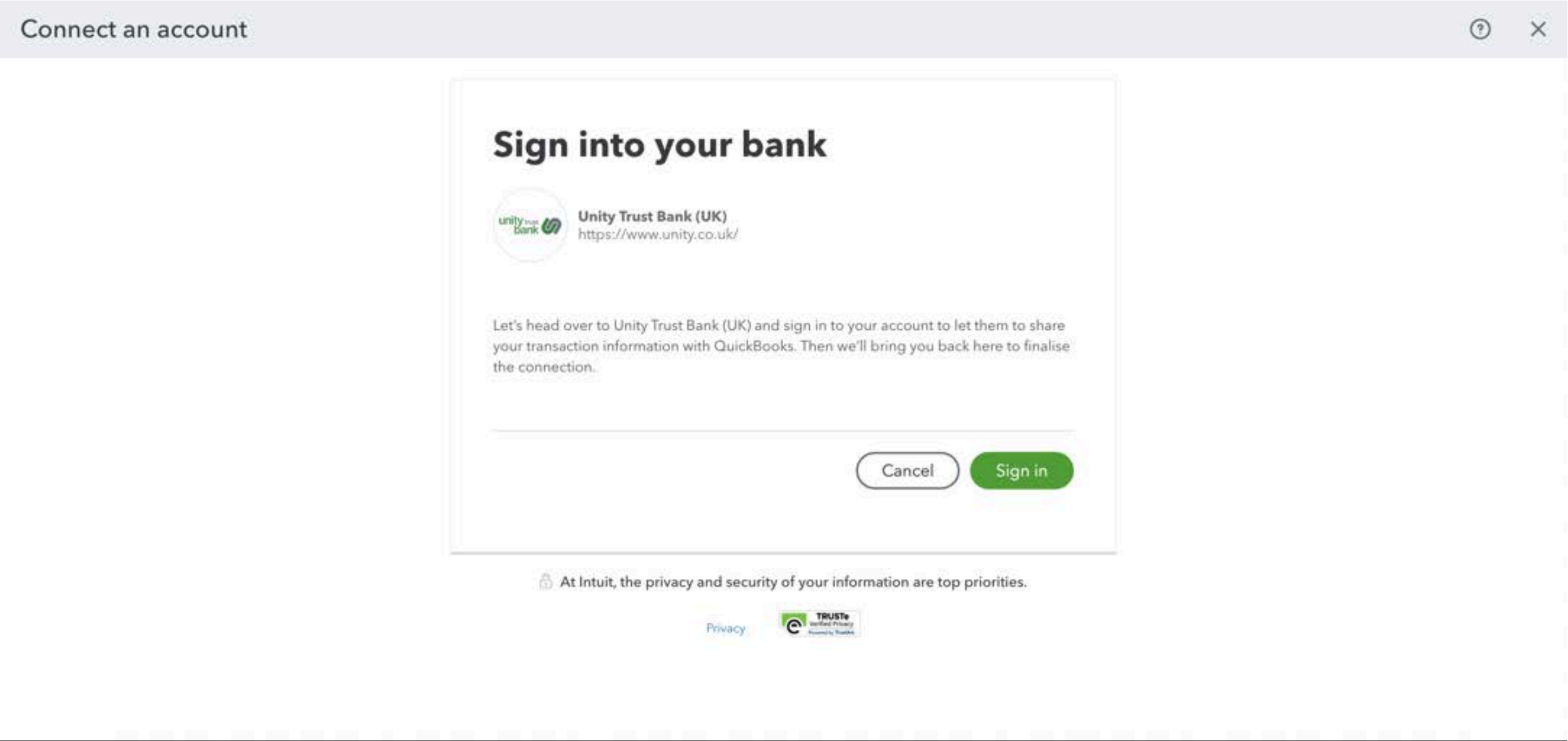
On the following pages you will be asked for your consent to allow Quickbooks bring your data from your account.



Consent

Please read the provided information as this will provide you with any relevant information related to sharing your data with Quickbooks.

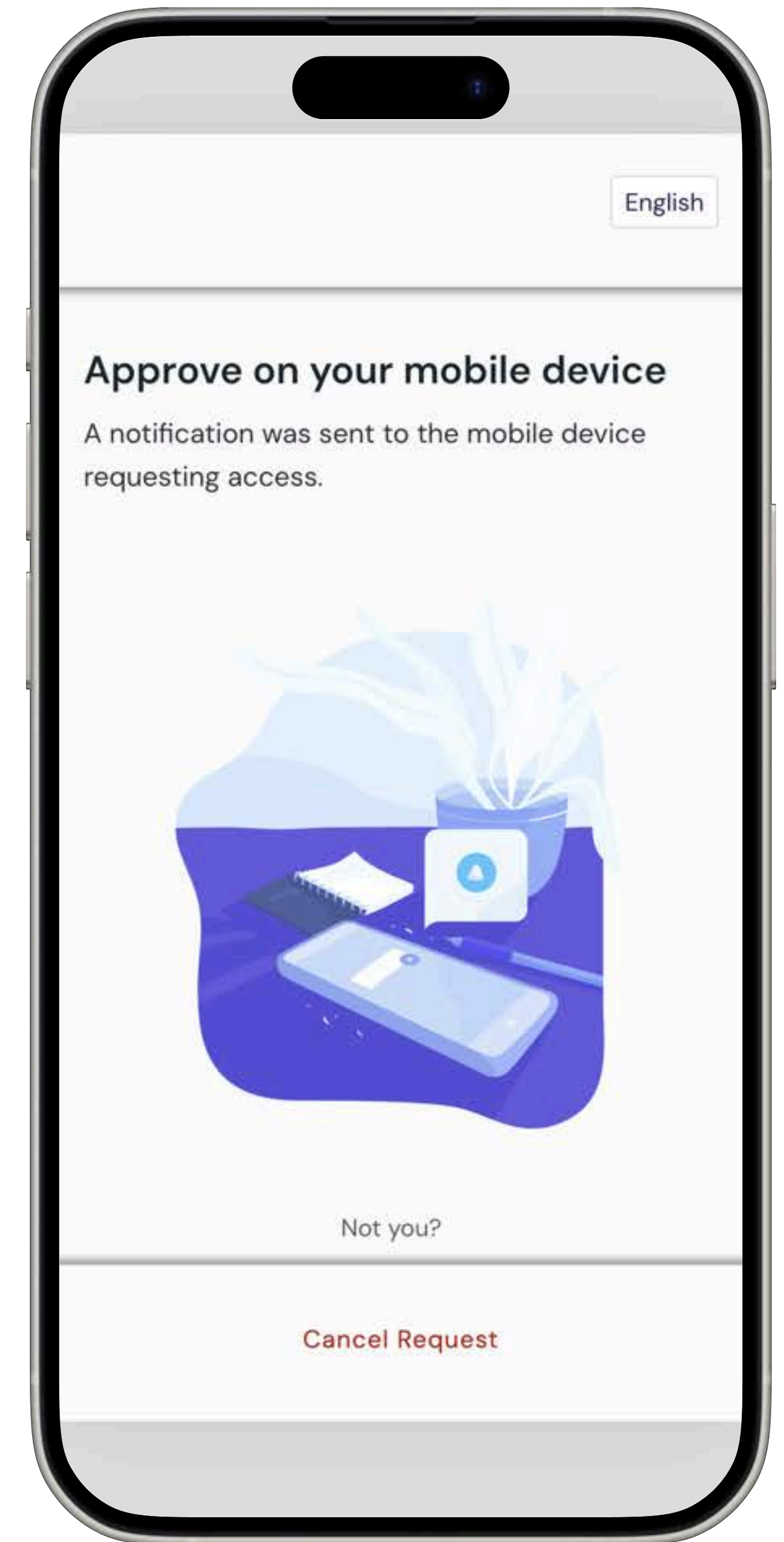
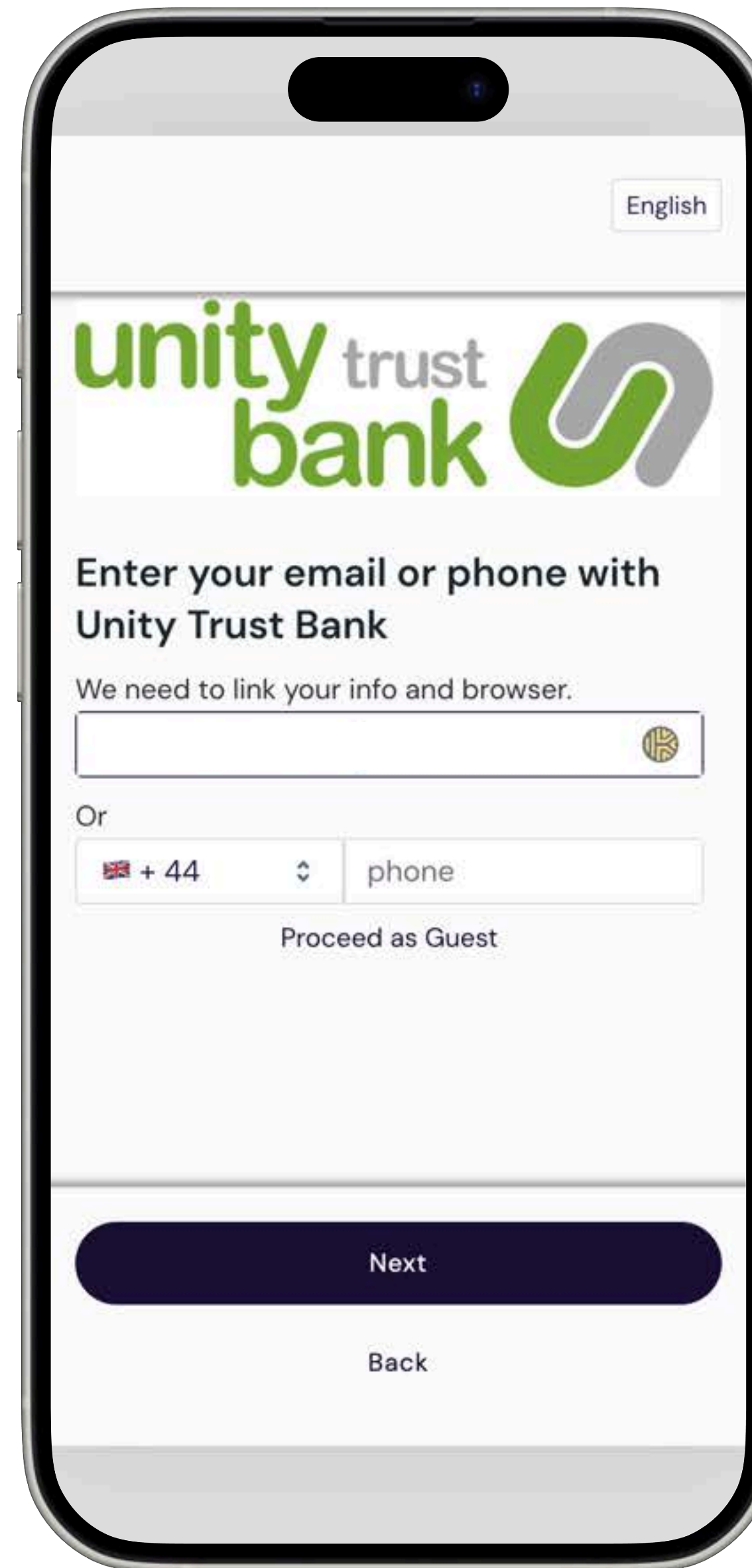
Step 4: Sign into your
Unity Trust Account



Step 5: Login and approve

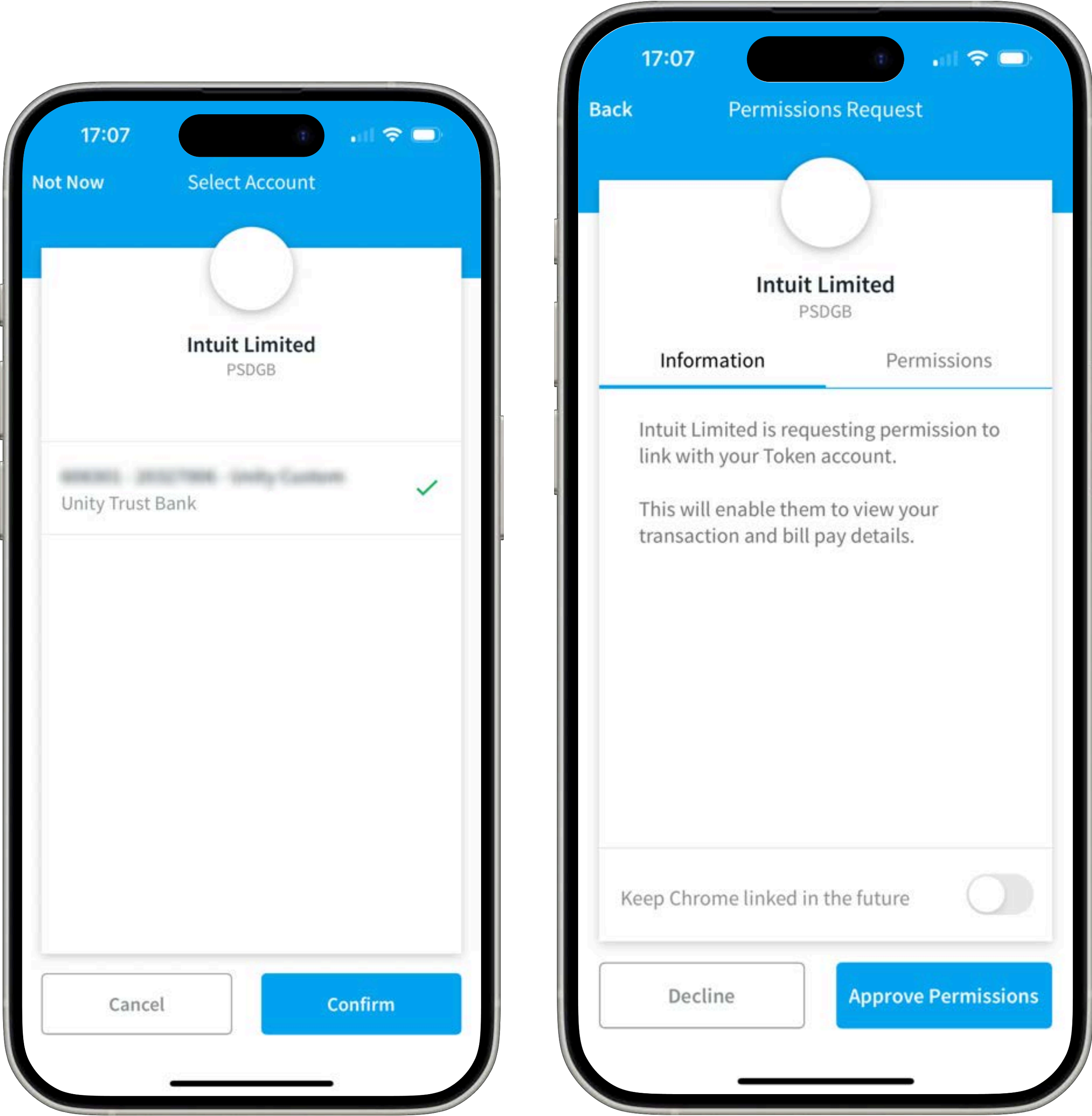
During this step you will be required to sign into your Unity Trust Bank Account (case sensitive).

Once the correct details have been entered you will be asked to approve this request within the **'Token'** App



Step 6: Approve Request in Token

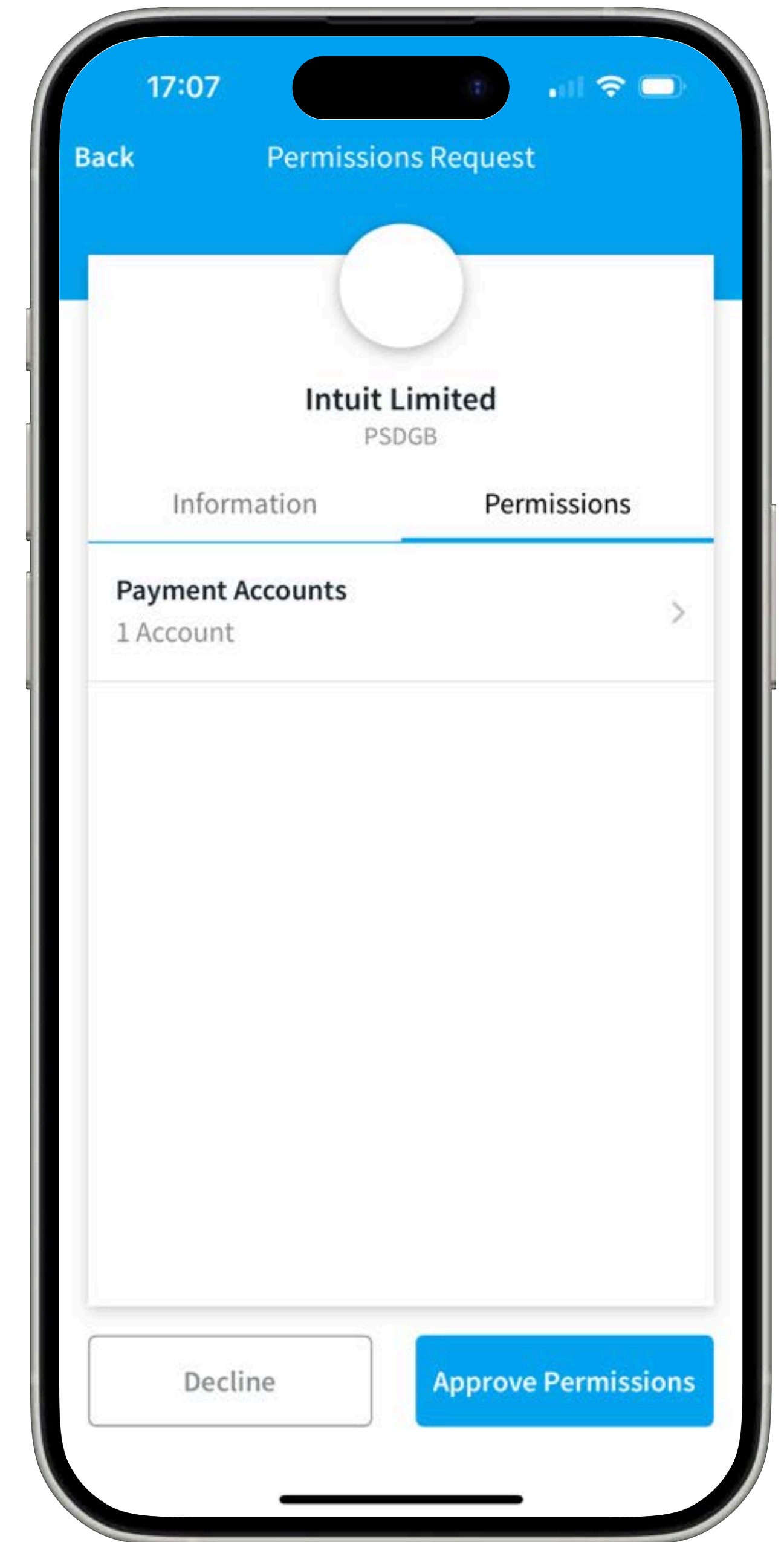
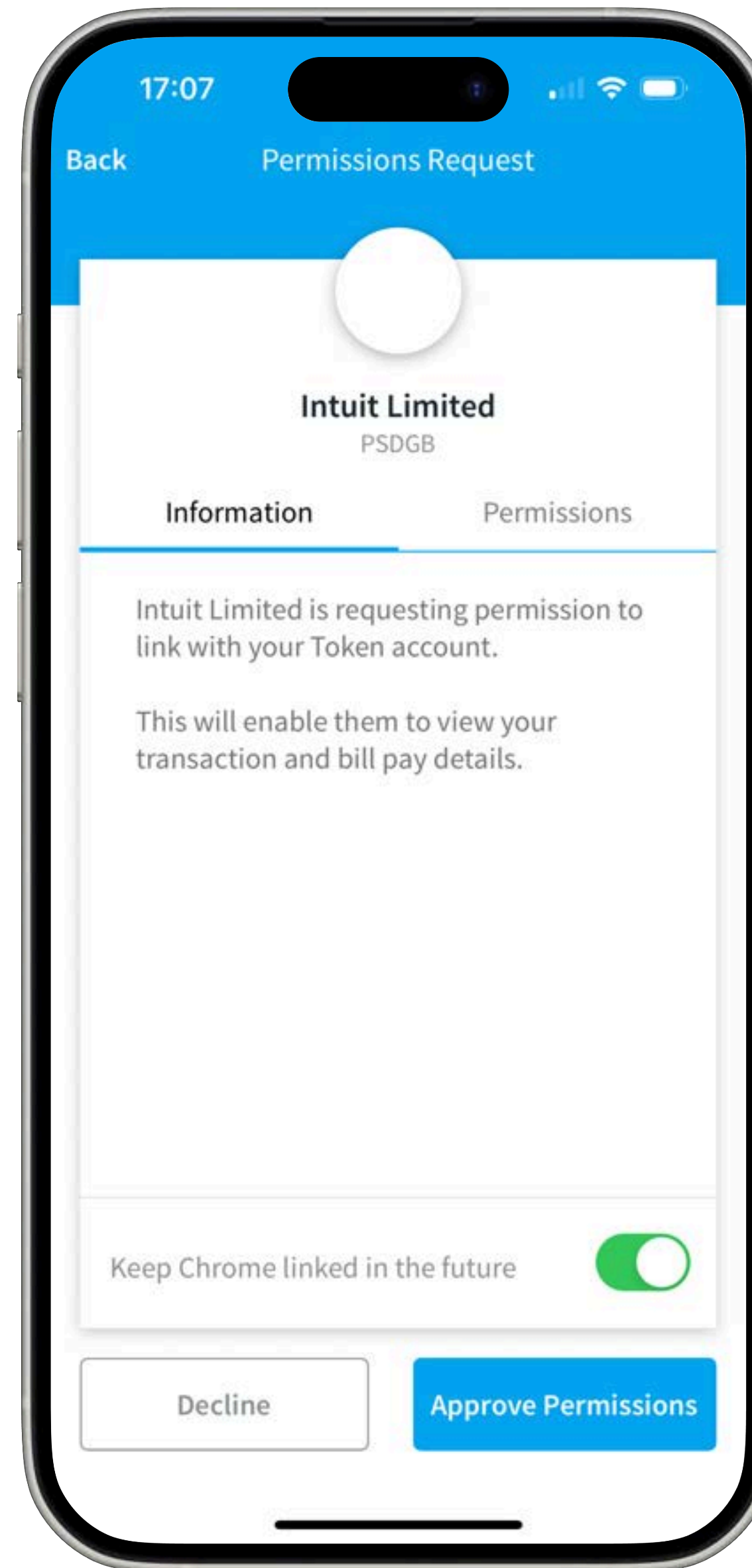
You will be asked to open your Token application. Upon opening the application, you will be prompted to confirm and approve the recent request.



Step 7: Features

Information: tab will provide you with any relevant information you may need to be aware of before proceeding.

Permissions: Will provide you with a view of all or any accounts you have approved with this request.

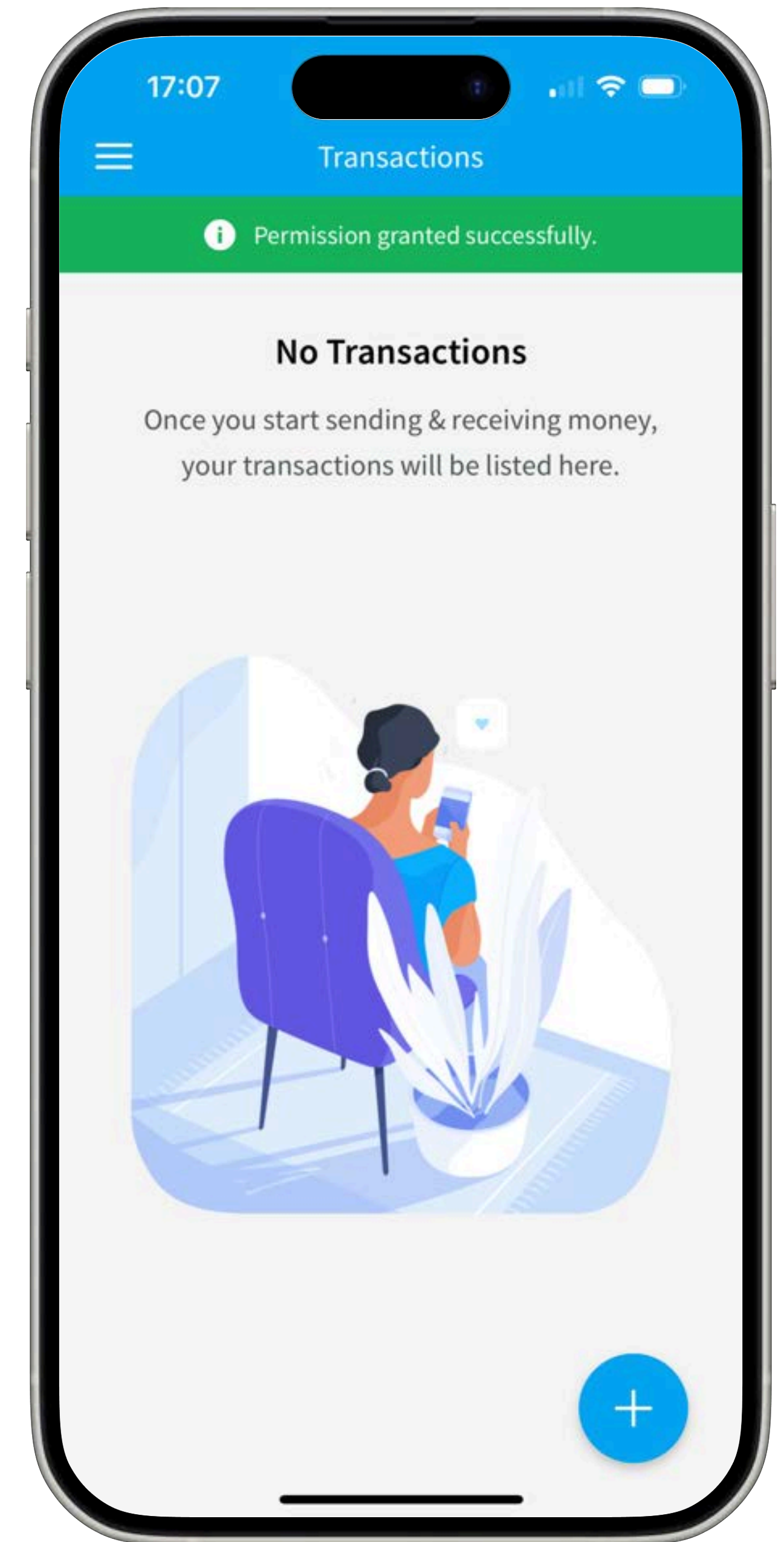
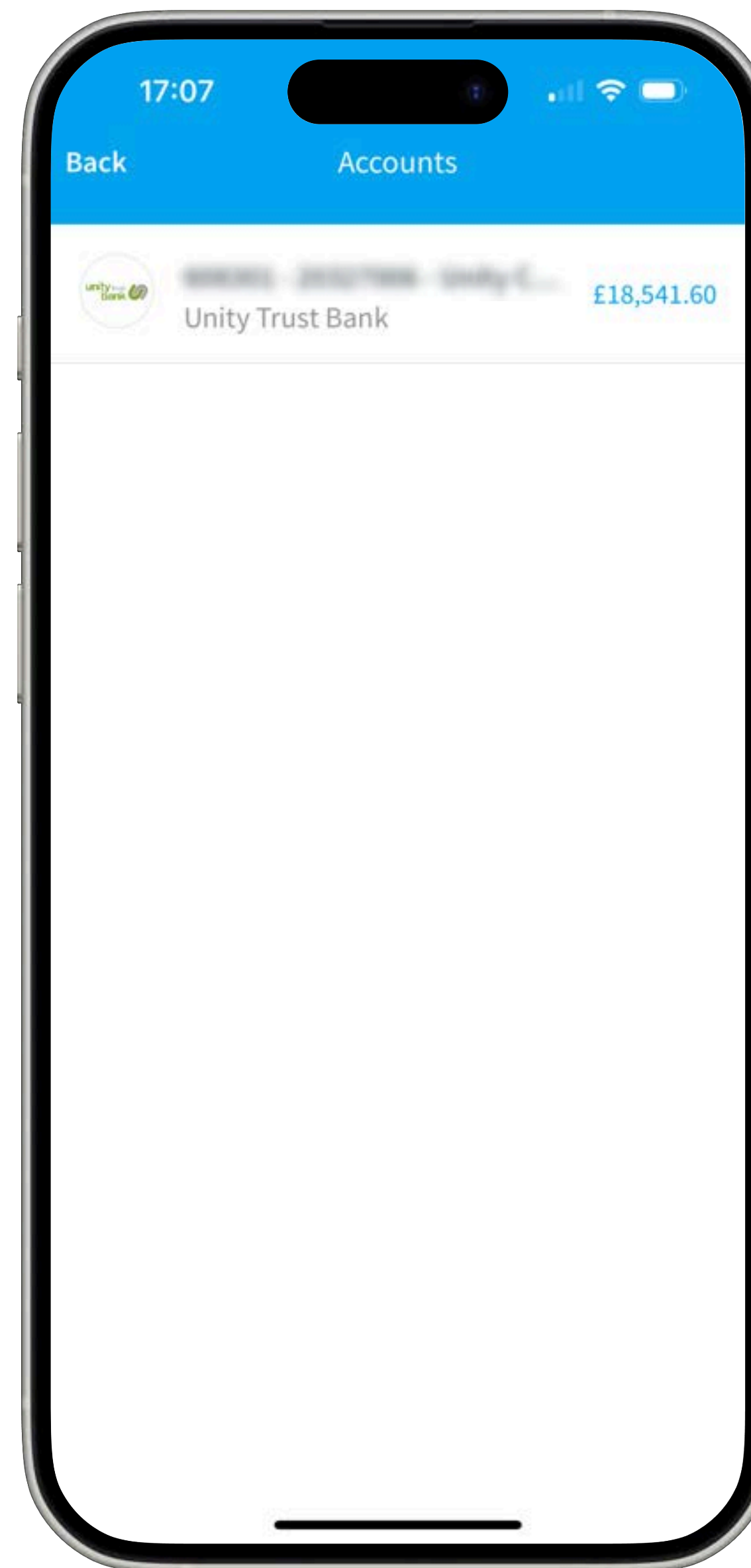


Step 8: Approval completed

Selecting the account in permissions will give you a quick summary view of the account to date.

Completed steps: Once you have confirmed and approved these steps you will receive an alert message saying **'Permission granted successfully'**.

You can now return to the Token desktop version.



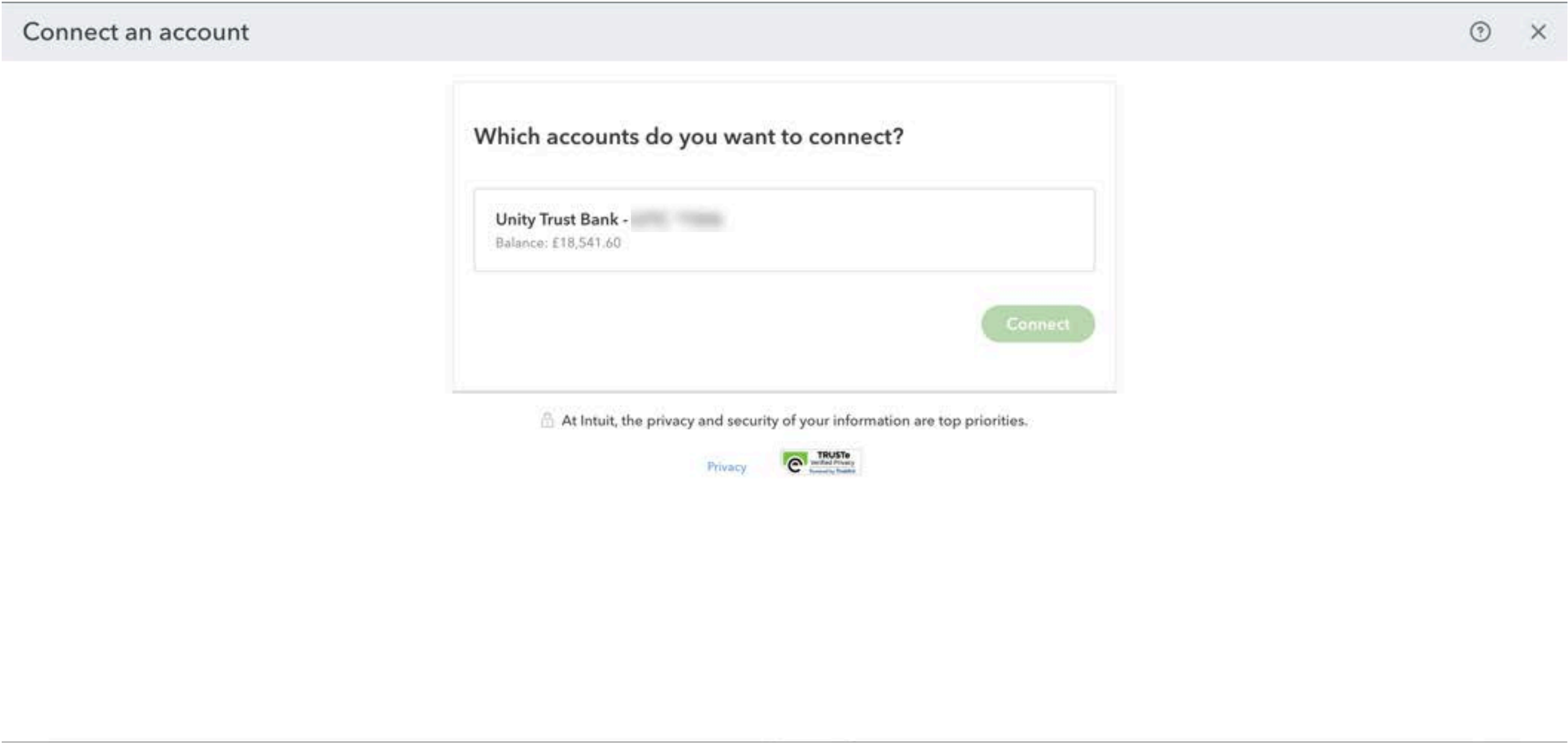
Step 9: Connection Quickbooks and Token

You may see this transition screen while Quickbooks is retrieving data from Token and Unity Trust Bank



Step 10: Select the above account

Once you select the above account you will be asked to provide any further information related to the account.



Step 11: Select the above account

Once you select the above account you will be asked to provide any further information related to the account. If the information is correct you can press **‘Save and Close’**.

Connect an account

Account

Account Type

Credit Card

*Detail Type

Credit Card

Credit card accounts track the balance due on your business credit cards.

Create one **Credit card** account for each credit card account your business uses.

*Name

Unity Business Current Account

Description

☐ Is sub-account

Enter parent account

Cancel

Save and Close

Step 12: Pull Transactions

You can now select a specific date (some banks limitations apply) to pull all transactions associated with this account. Then press **Connect** and proceed to the next step.

Connect an account

Which accounts do you want to connect?

Unity Trust Bank -

Balance: £18,541.60

Unity Business Current Ac

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.

This year (01/01/2025)

Connect

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

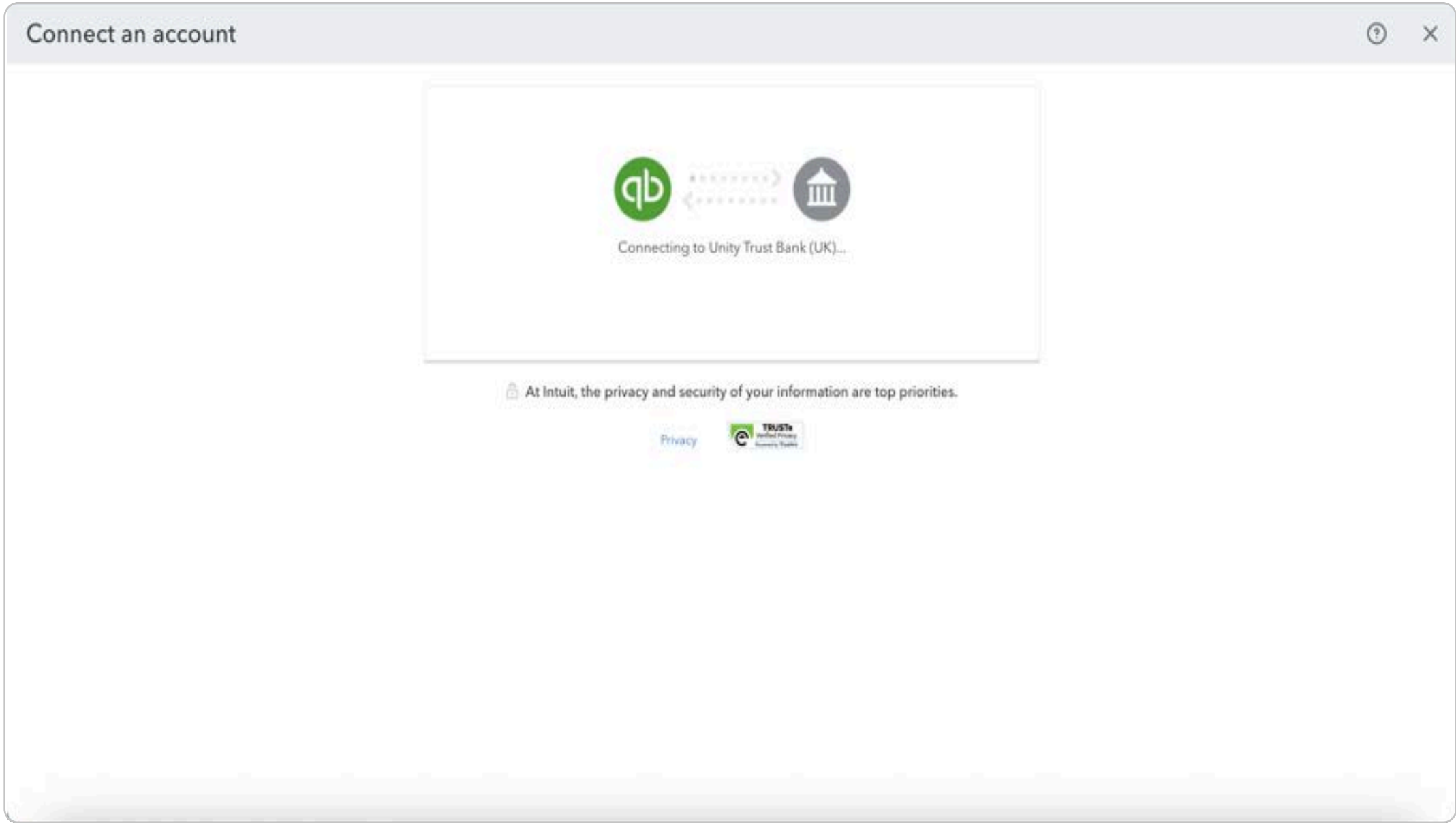
Privacy

TRUSTe

Verified Privacy

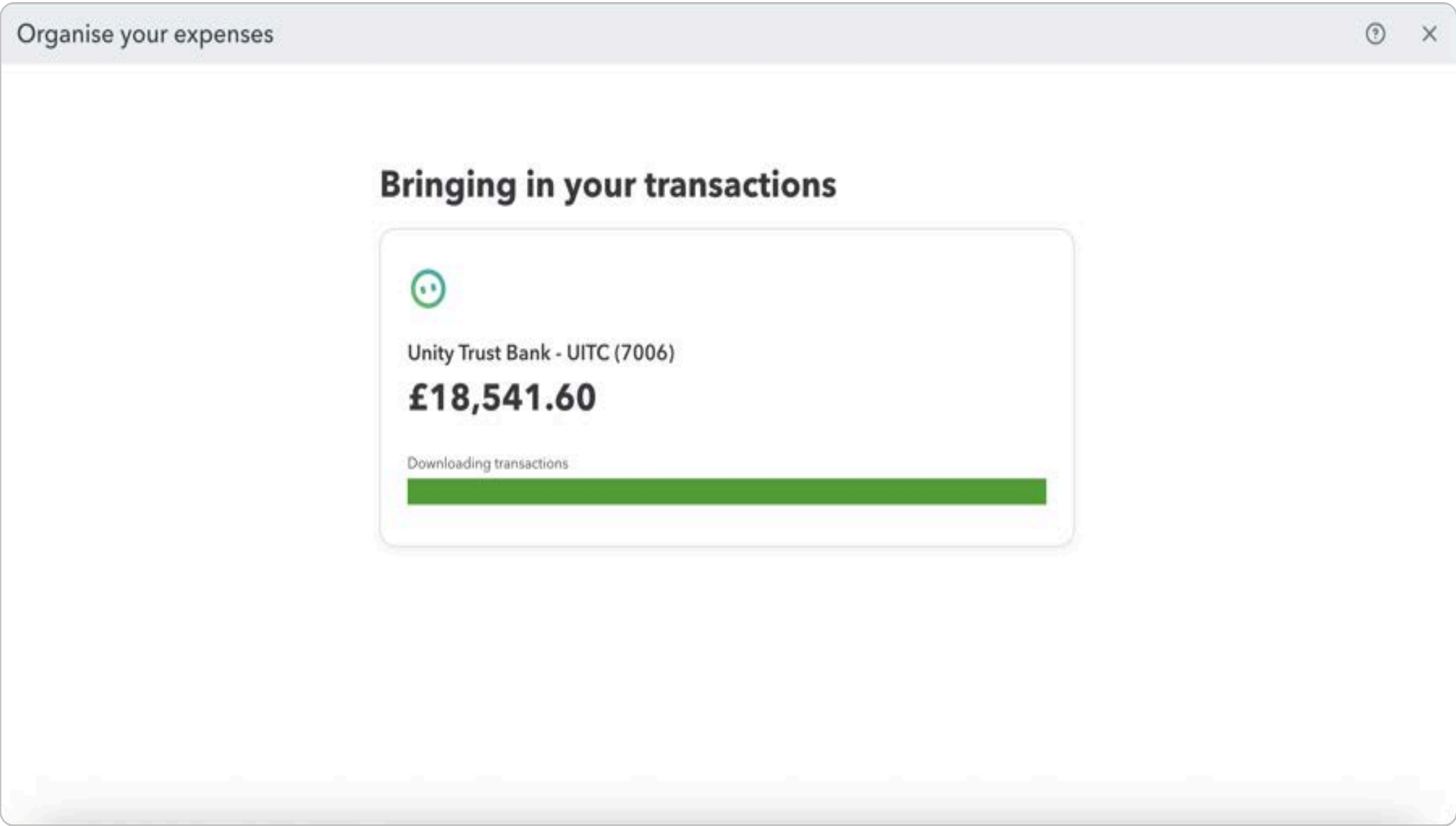
Assurance, Simplified

Step 13: The connection process



Almost there

Quickbooks will now try and connect and retrieve this information from Token and Unity Trust Bank to make sure all your data is synced with the platform.



Downloading transactions

Quickbooks will now attempt to download all this account information to the Quickbooks platform to be easily accessible to you.

Success

You are now ready to go.

Please read all the information provided to assist you making the correct decisions when using your Unity Trust Bank account with third party platforms.



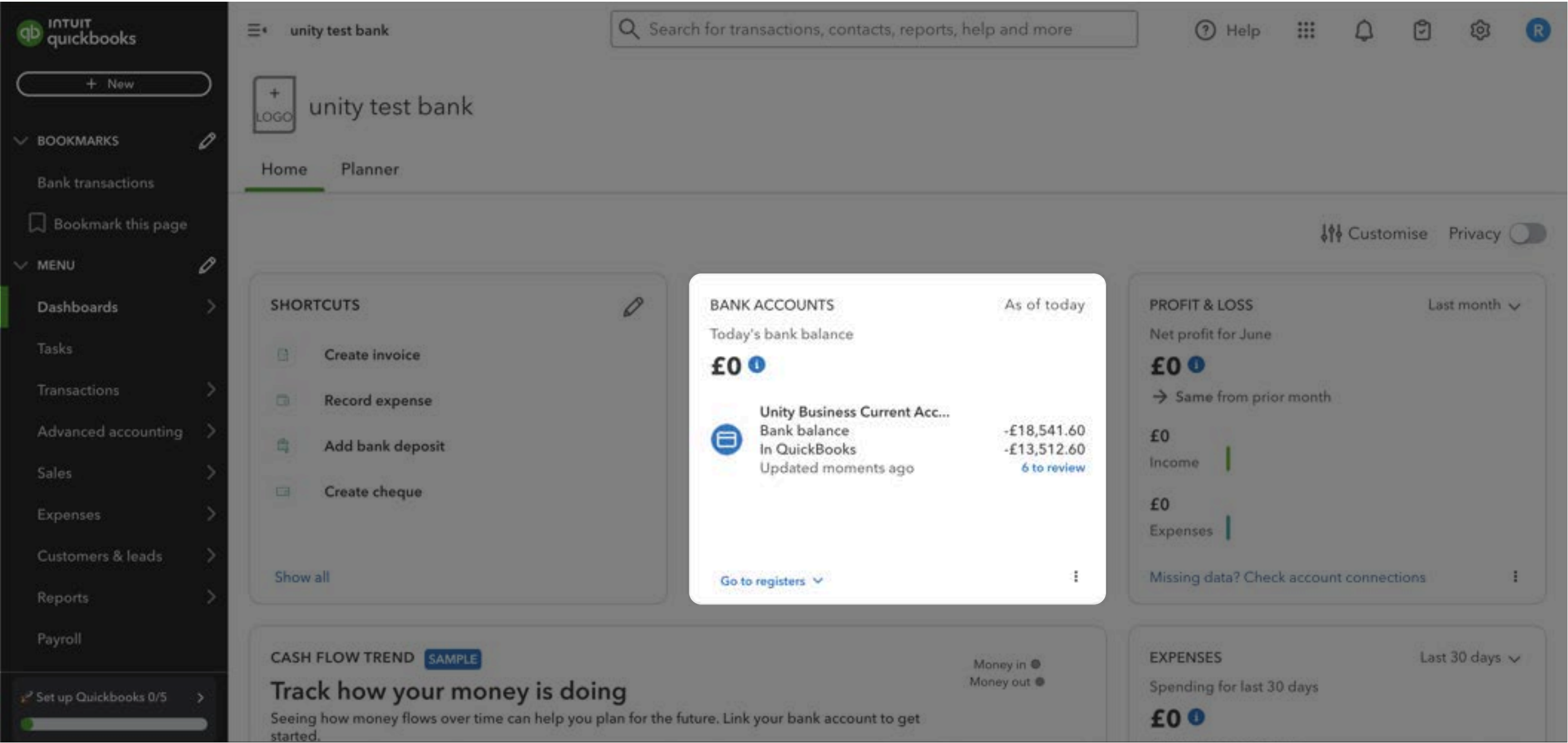
All set! You're connected and ready to go.

New regulation requires you to reauthorise every 90 days.
We'll remind you 15 days before your connection expires.

Done

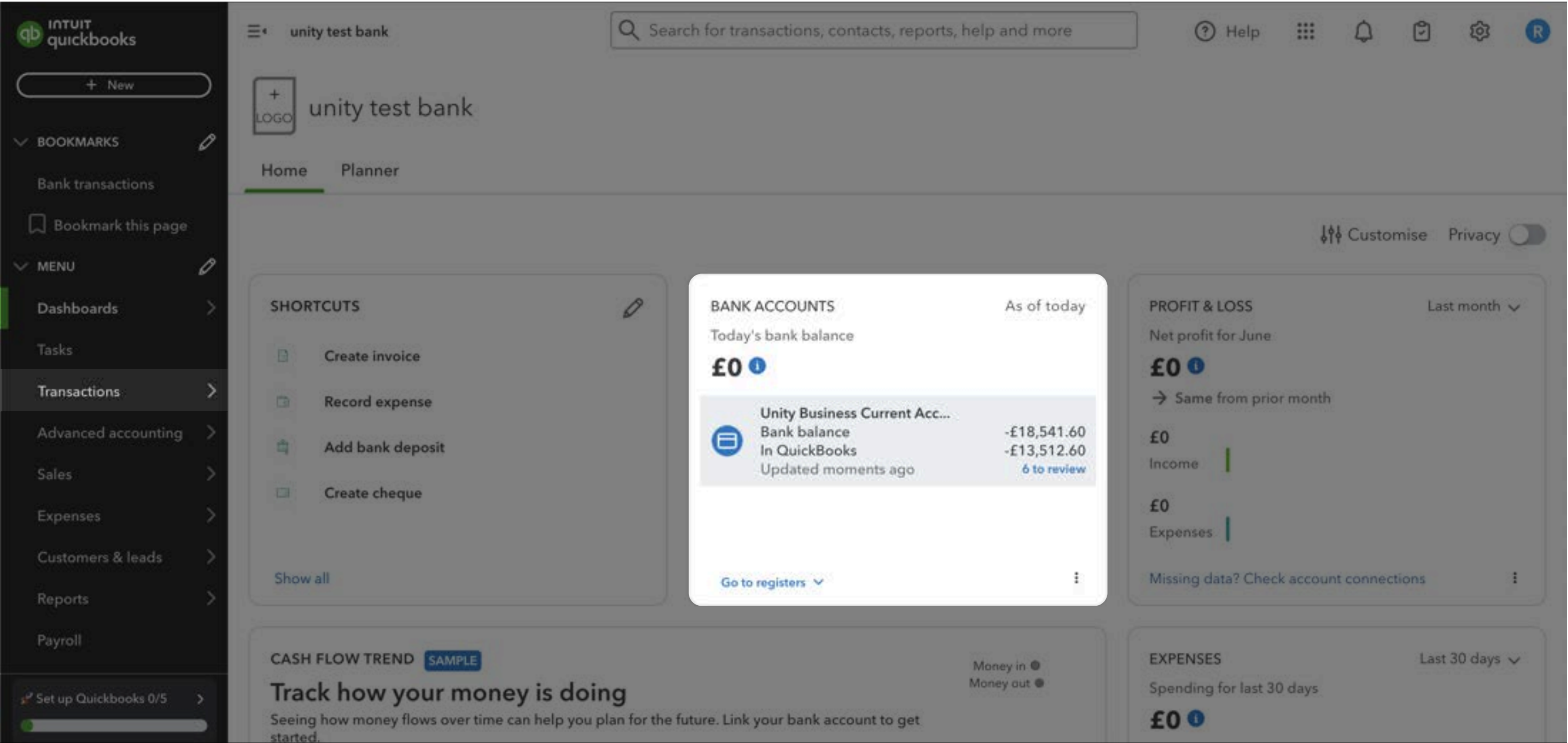
You account is now connected

No further action is required you have successfully linked your Unity Trust Account to Quickbooks via the Token platform.



View Transactions

You can view your Unity Trust Account transactions by either clicking the navigation tab or by selecting the Unity Bank Account Tab found in the dashboard screen.



Transactions

You have successfully connecting your Unity Trust Bank Account to Quickbooks desktop platform and have access to all your account information via the Quickbooks platform.

qb

INTUIT

quickbooks

+ New

BOOKMARKS

Bank transactions

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MENU

Dashboards

Tasks

Transactions

Advanced accounting

Sales

Expenses

Customers & leads

Reports

Payroll

Set up Quickbooks 0/5

unity test bank

Search for transactions, contacts, reports, help and more

Help

R

Transactions

Bank transactionsApp transactionsReceiptsReconcileRulesChart of accountsRecurring transactions

Unity Business Current Account

Give feedbackUpdateLink account

Unity Business Current ...
Bank: -£18,541.60
Posted: -£13,512.60 6 min ago

Pending (6)PostedExcluded

Search

All dates

All transactions (6)

1-6 of 6

1

	Date	Bank Description	Spent	Received		From/To	Match/Categorise	Action
	03/07/2025	Jun Payroll Deductions		£909.00	+	Select cus	Billable Expense Income	MatchCategorisePost
	22/05/2025	May Payroll Deductions		£881.00	+	Select cus	Billable Expense Income	MatchCategorisePost
	24/04/2025	Apr Payroll Deductions		£841.00	+	Select cus	Billable Expense Income	MatchCategorisePost

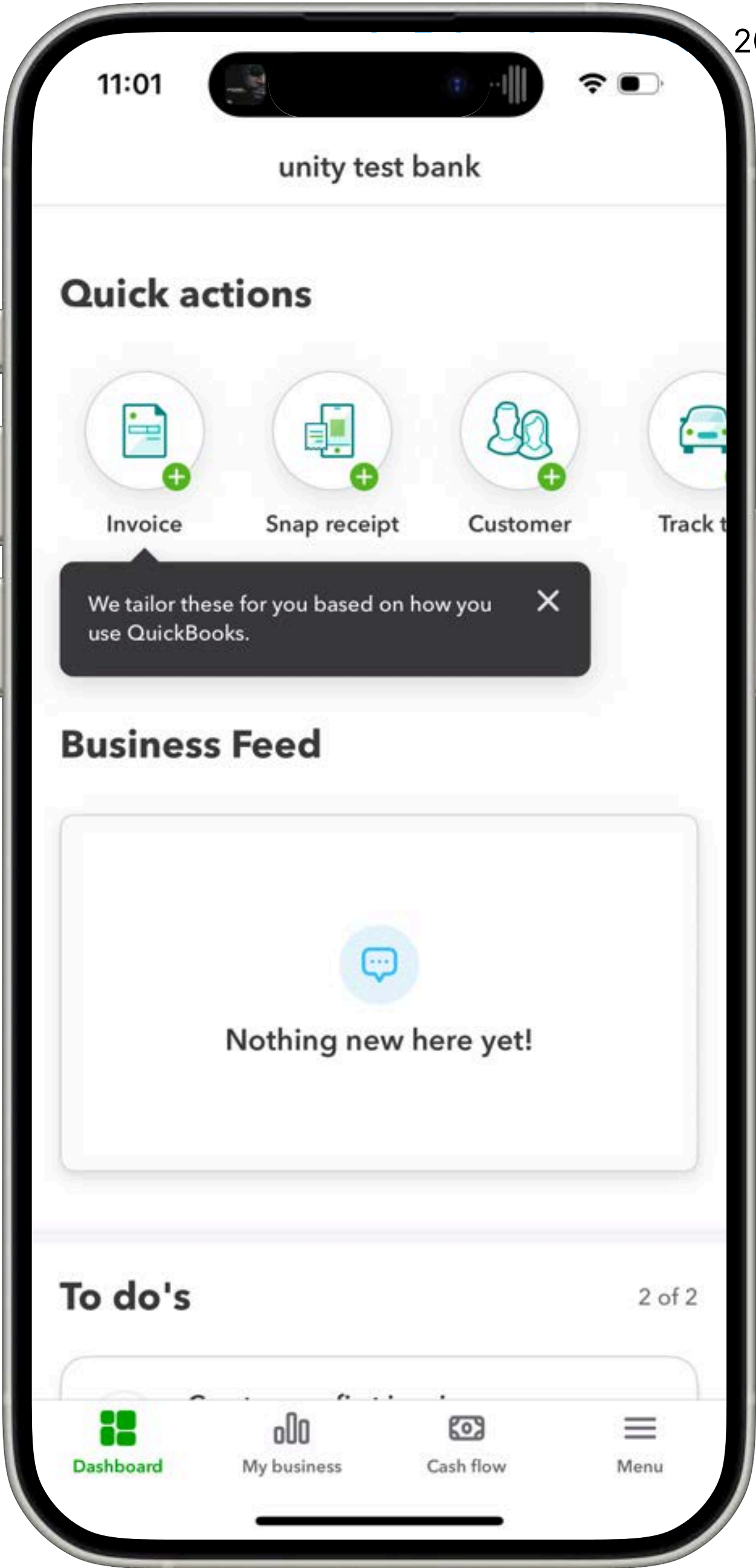
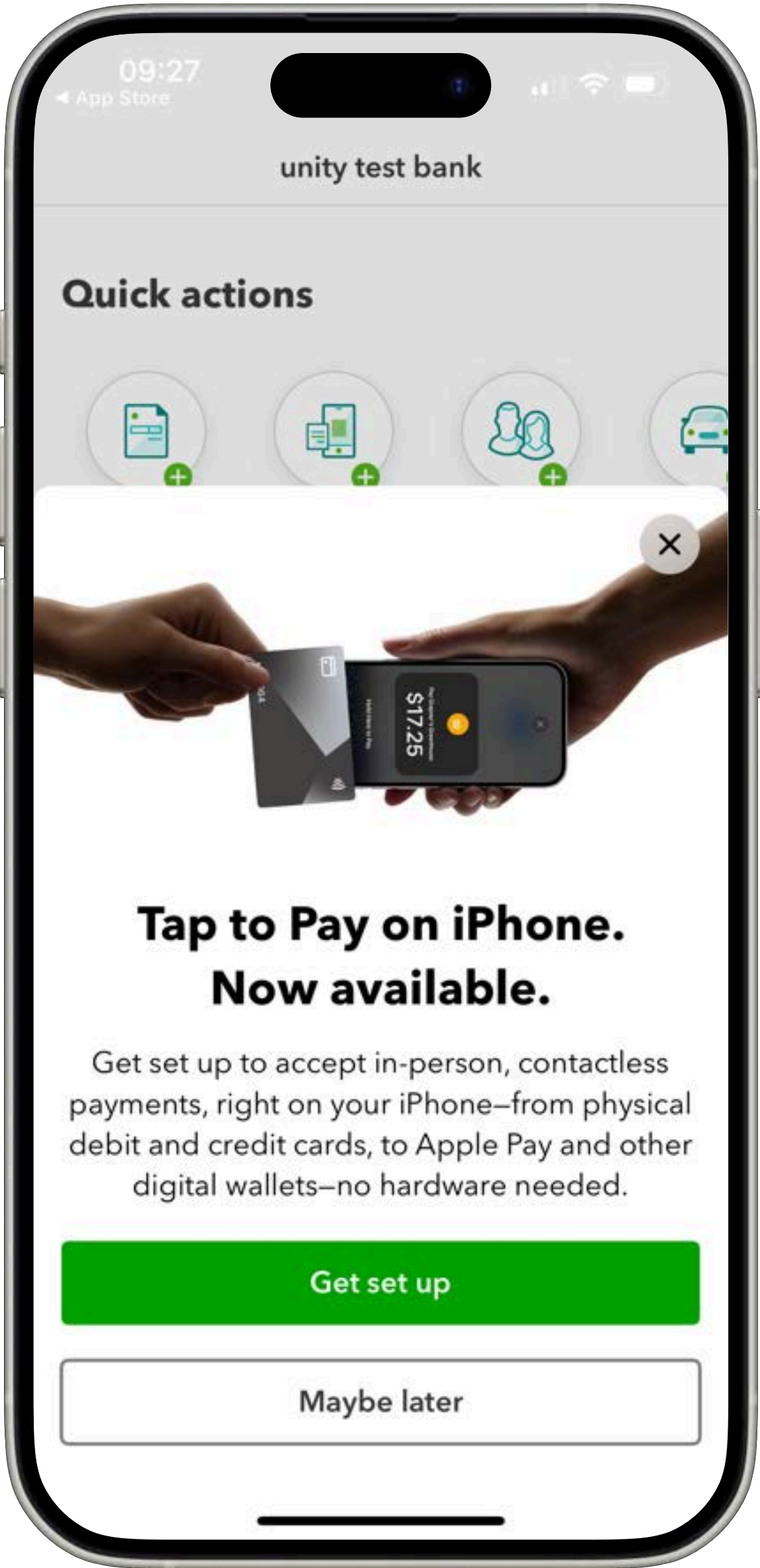


Connecting to QuickBooks Mobile

This section will guide you step by step through the setup process using the mobile application.

Step 1: First time login

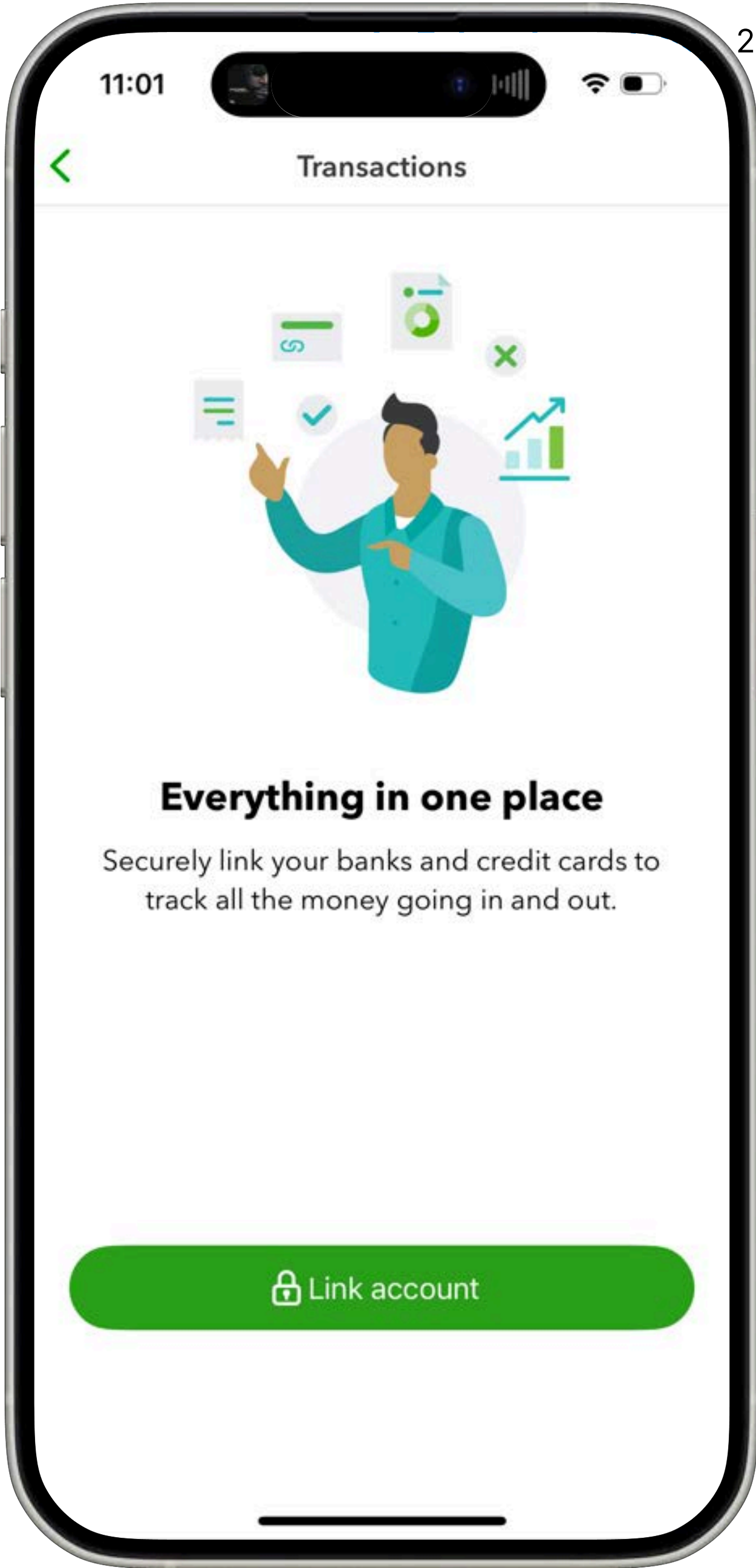
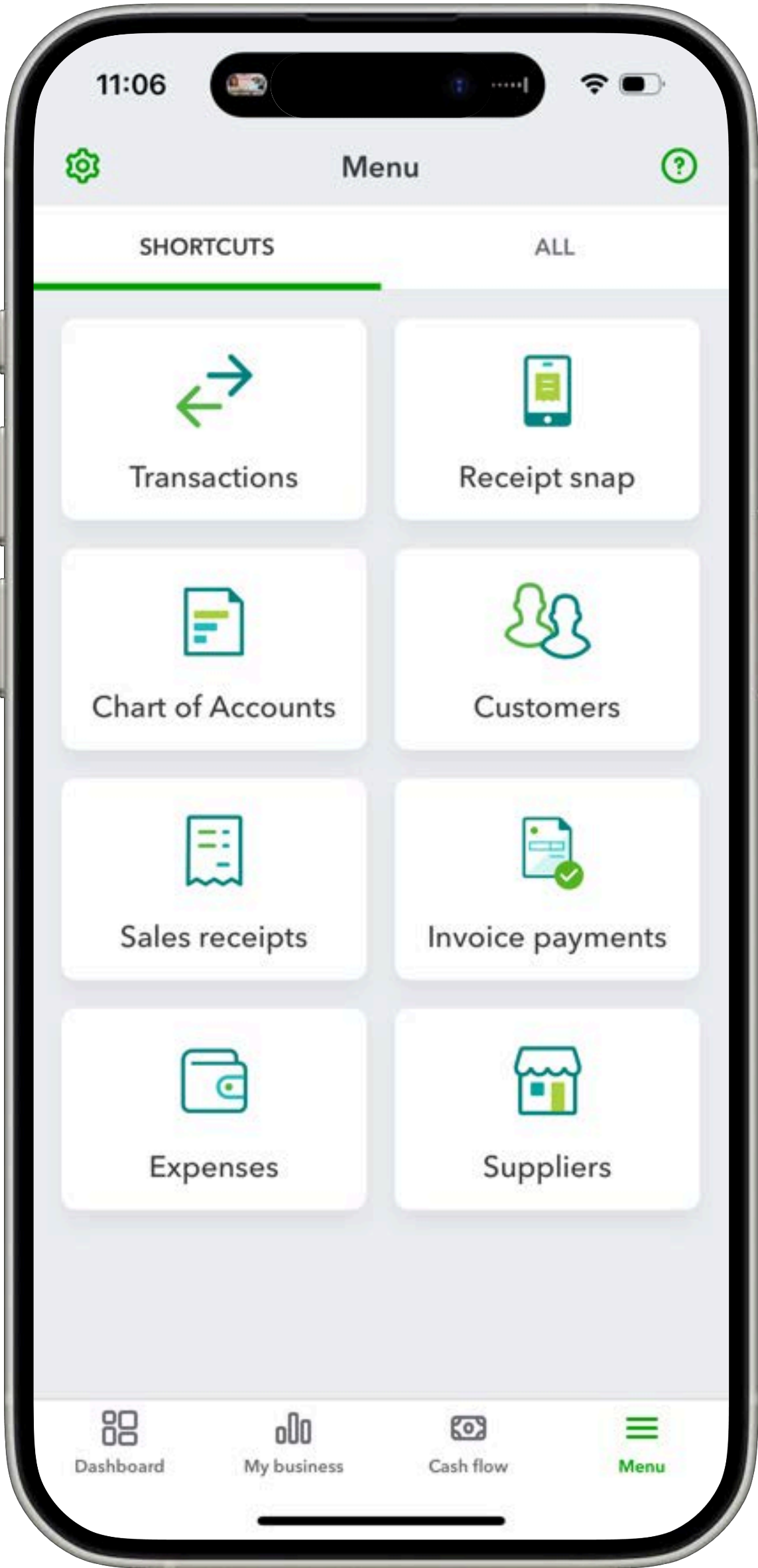
When you log into the Quickbooks mobile application for the first time. You will be presented with some onboarding which you can set up later. During this process we will be linking our Unity Trust Bank Account to the Quickbooks mobile application.



Step 2: Linking your Unity Trust Bank Account

To link your Unity Trust Bank Account, you must select the Menu tab in the bottom bar navigation. Once selected, select the **‘Transactions’** tab. (Easily identifiable by the 2 arrows pointing in different directions).

After selecting **‘Transactions’** tab you will be taken to the transactions page and asked to link your account by clicking the **‘Link account’** button.

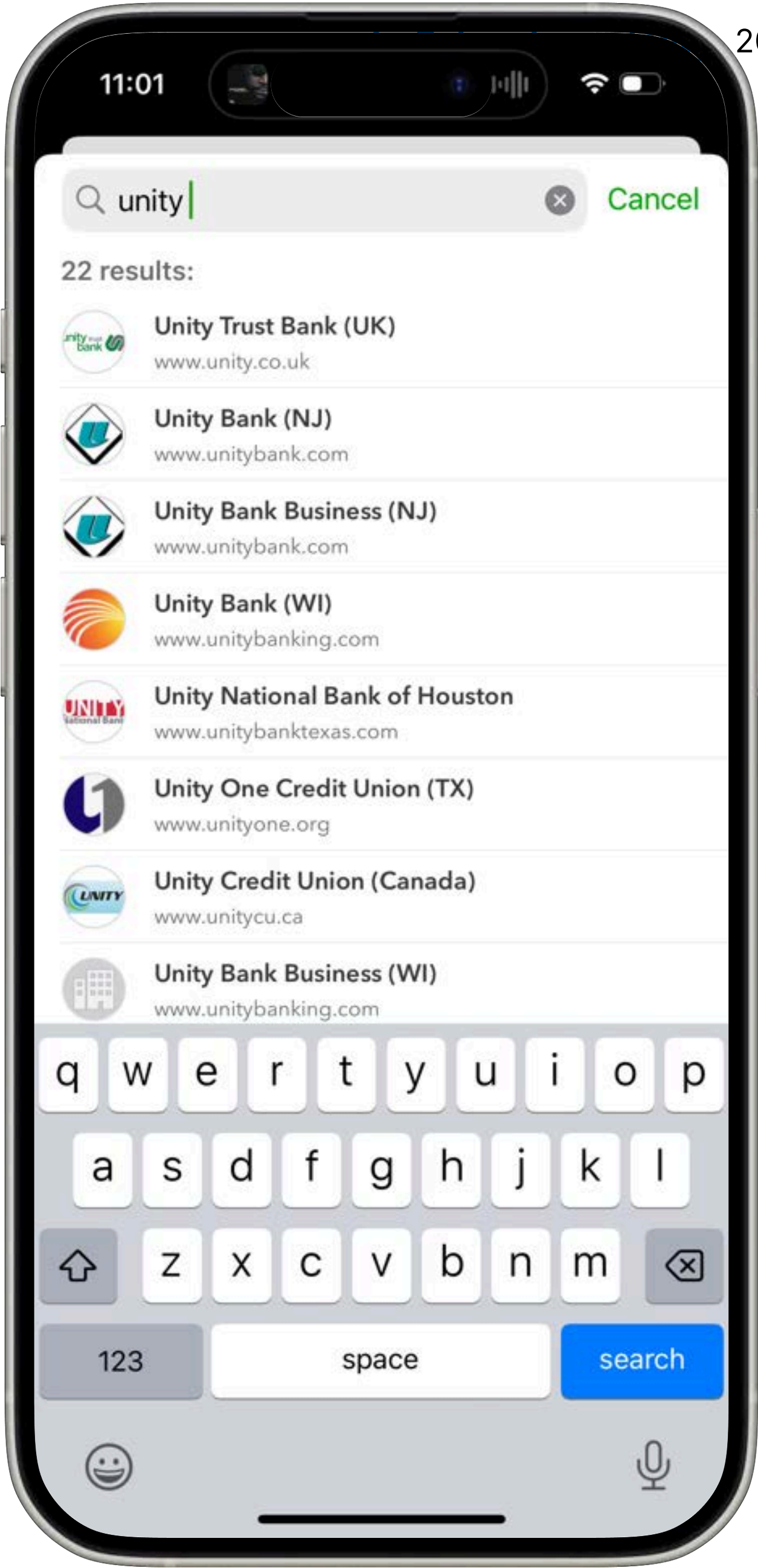
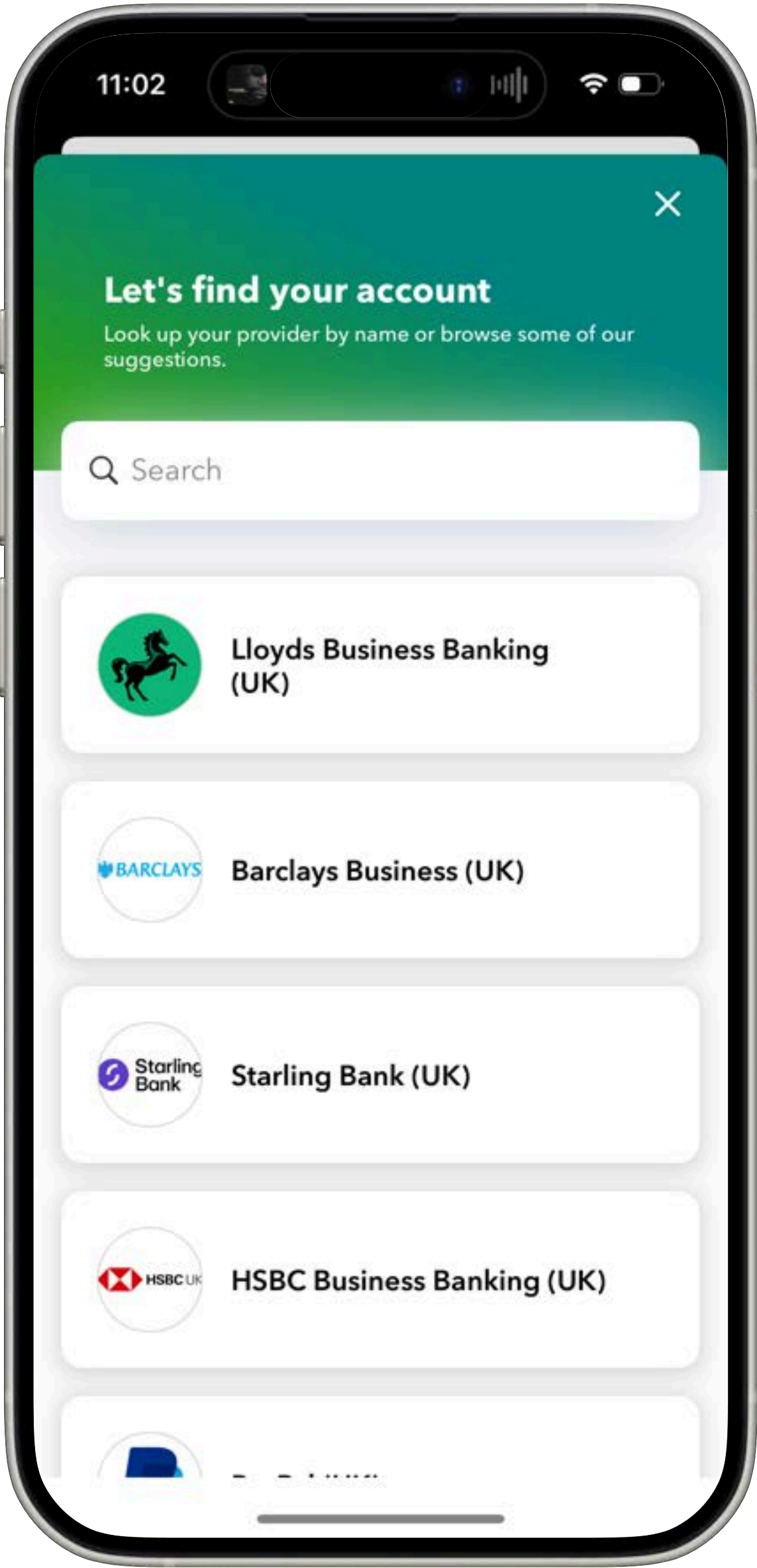


Step 3: Find your Unity Trust Bank Account

After clicking the 'Link account' button you will be taken 'Find your account' page.

You can easily search for Unity Trust Bank by typing our name in the search bar at the top of the page.

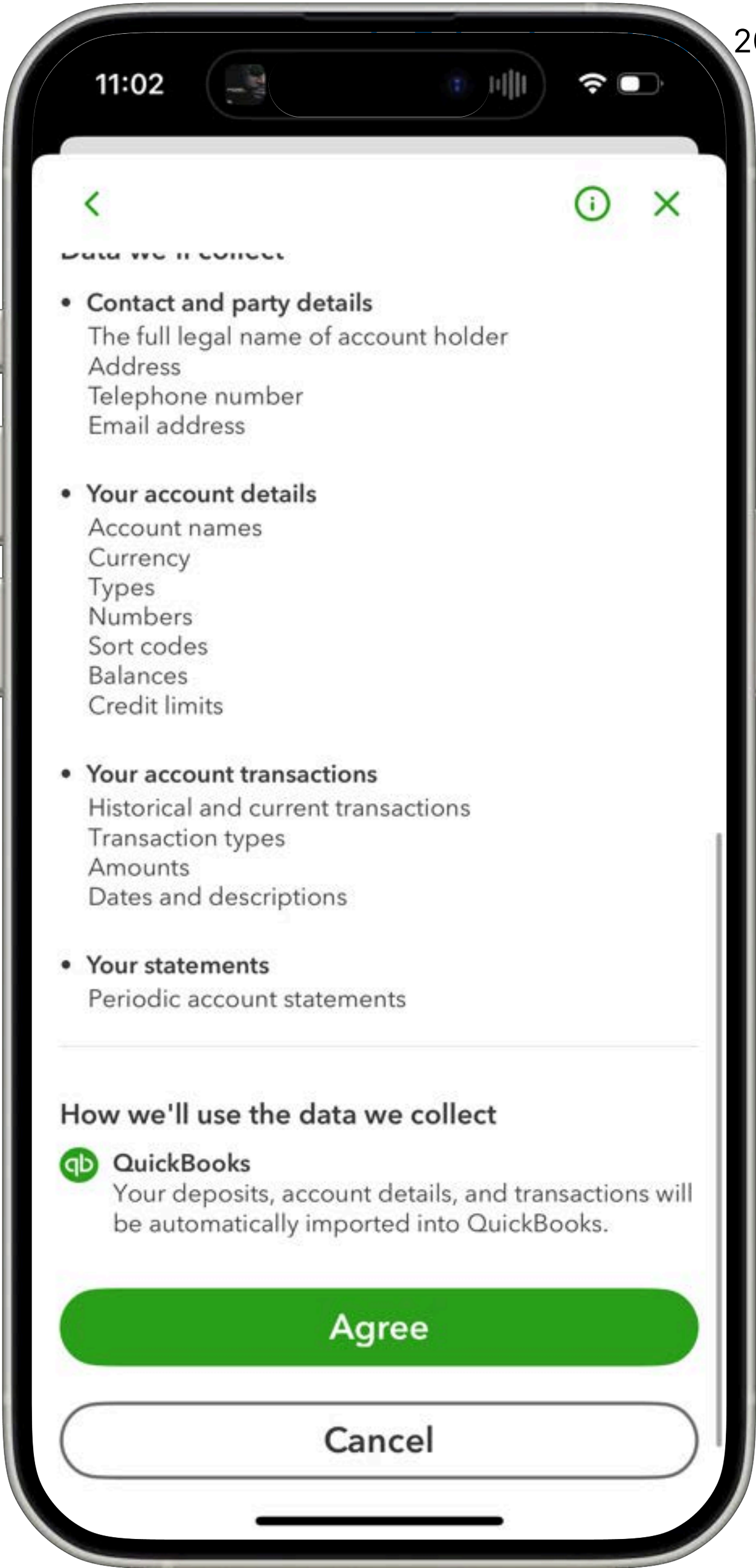
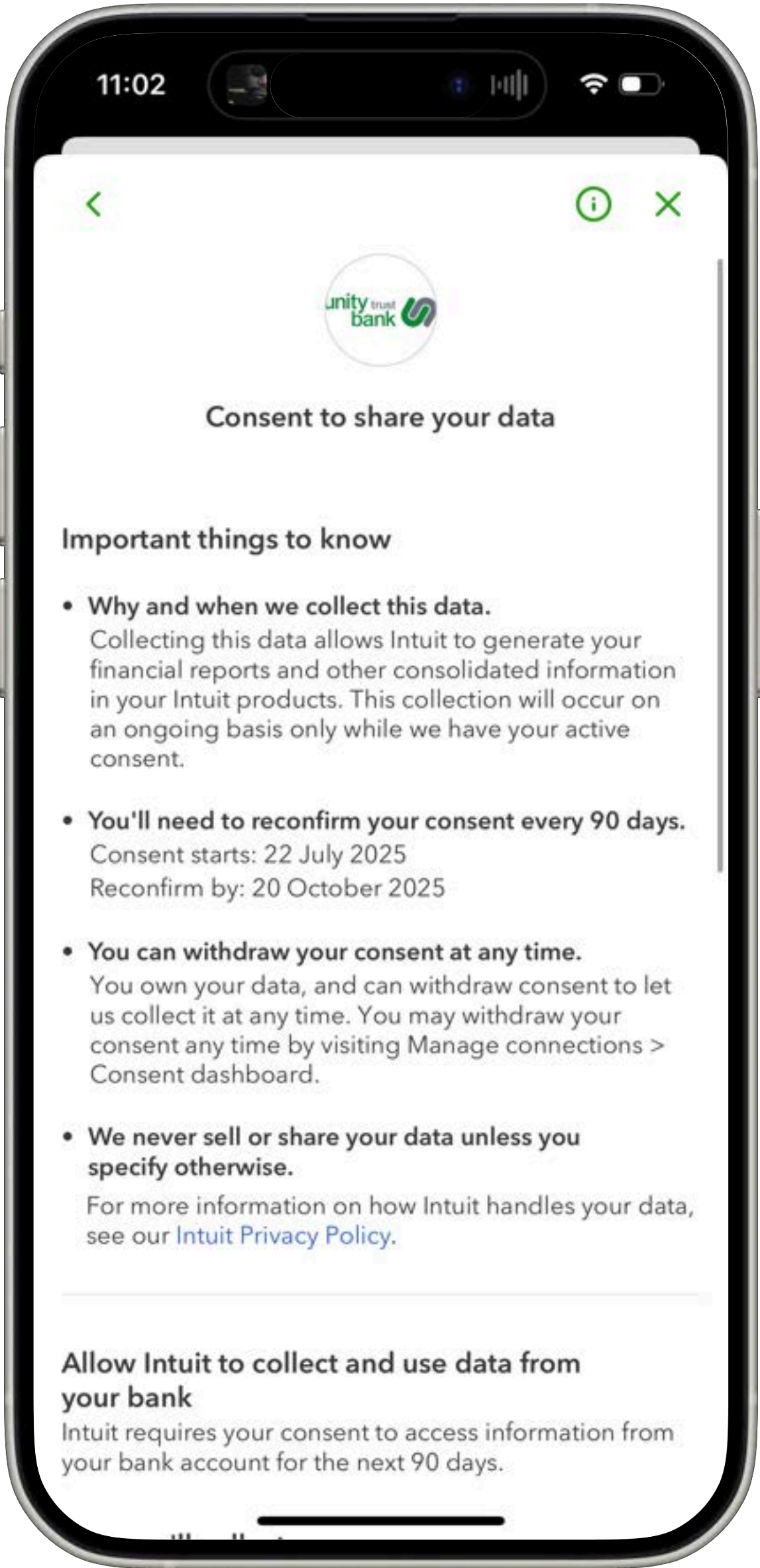
When the results are presented to you please select the correct Unity Trust Bank to proceed.



Step 4: Consent to share your data with Quickbooks

You will asked to confirm or agree to the Quickbooks consent to share your data documentation to proceed.

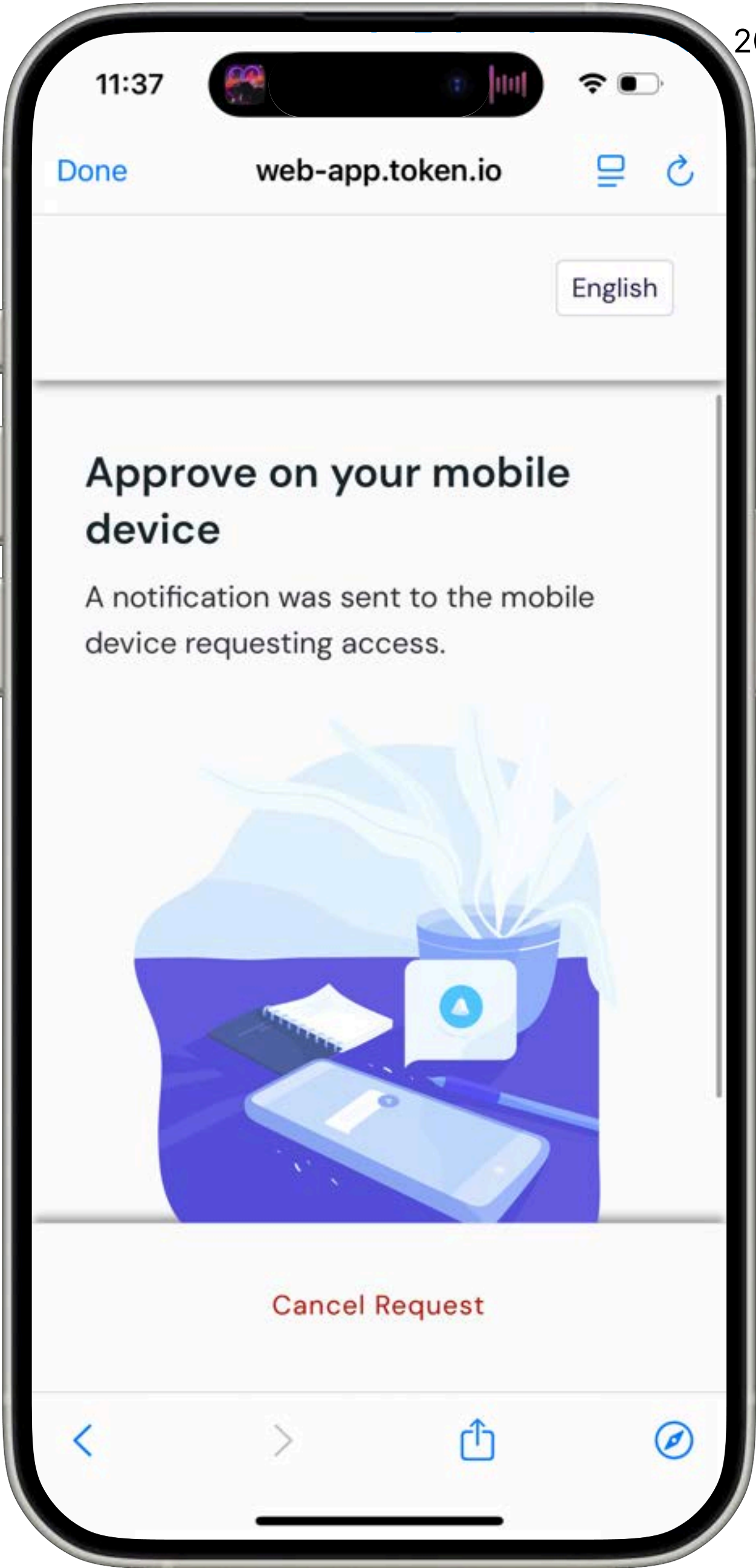
Your deposits, account details and transactions will be automatically imported into Quickbooks.



Step 5: Login and approve

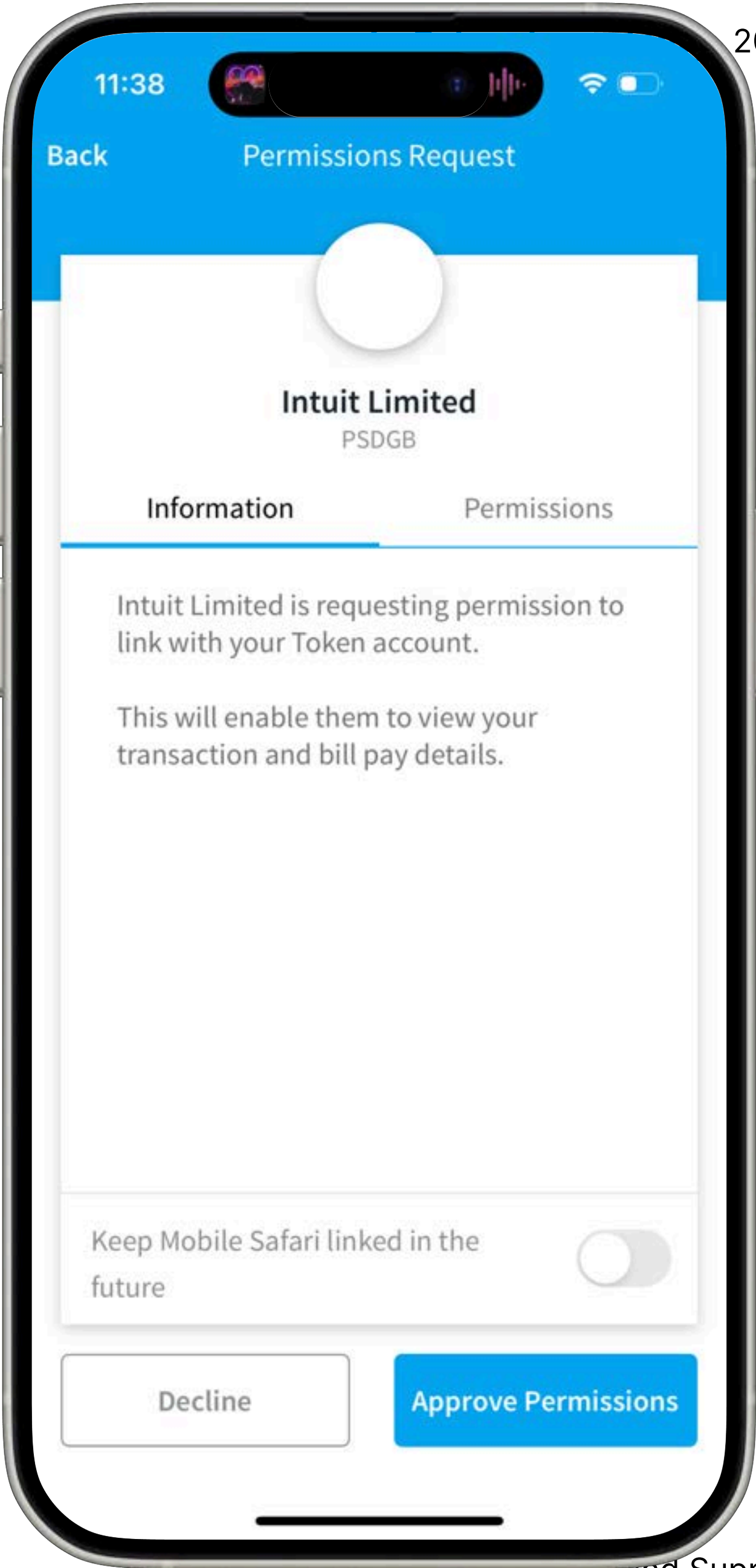
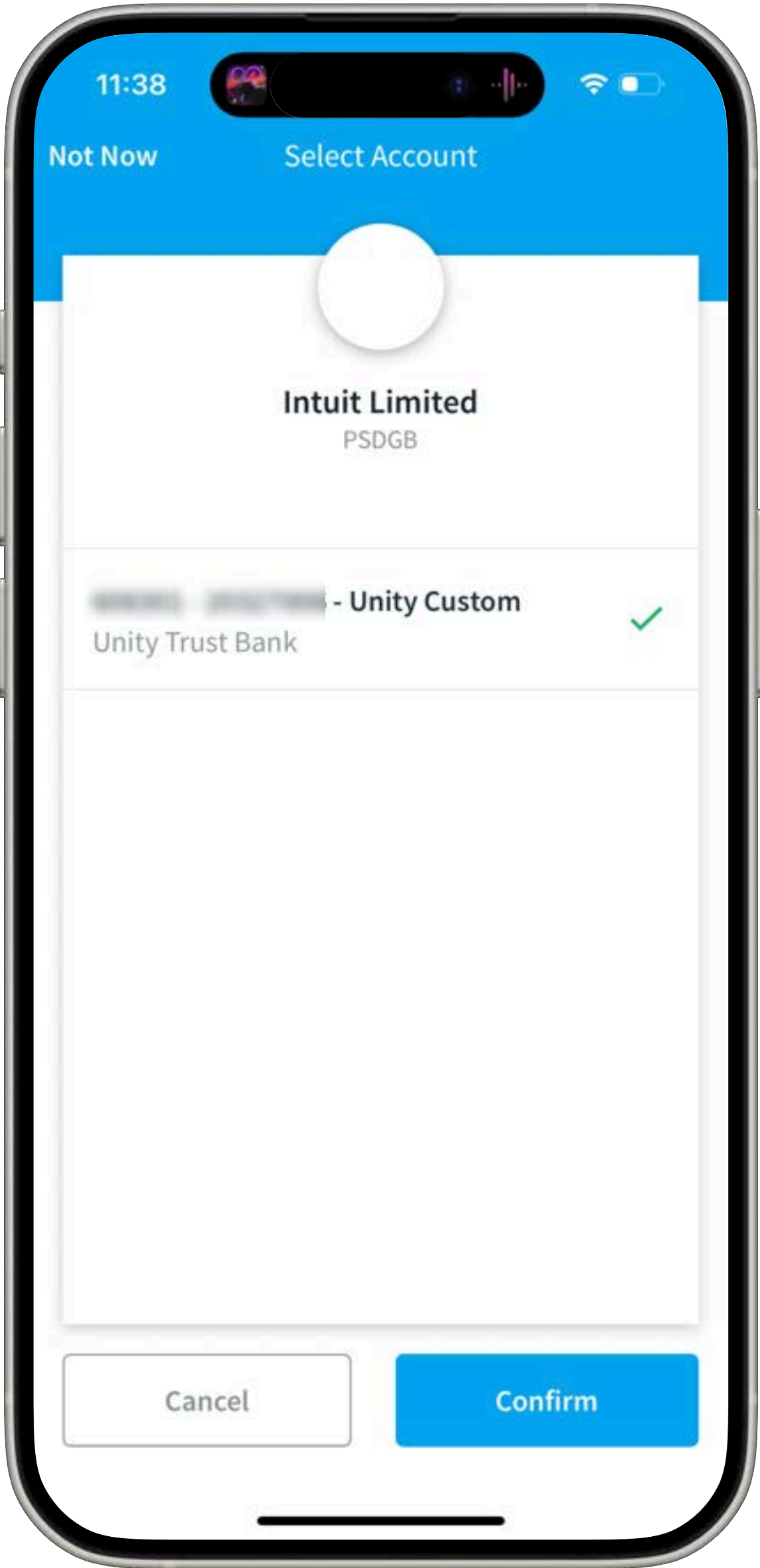
During this step you will be required to sign into your Unity Trust Bank Account (case sensitive).

Once the correct details have been entered you will be asked to approve this request within the **'Token'** App



Step 6: Approve Request in Token

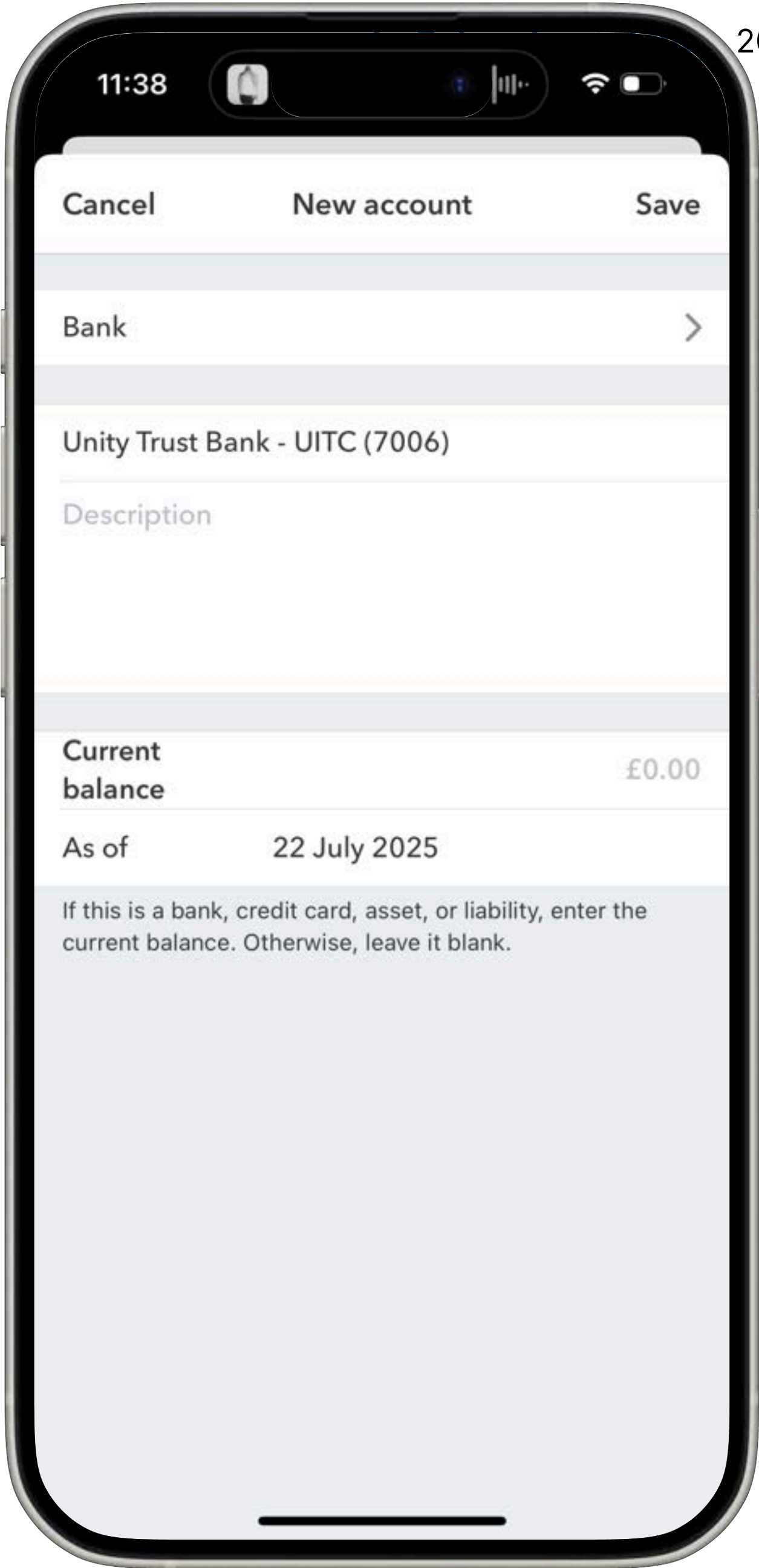
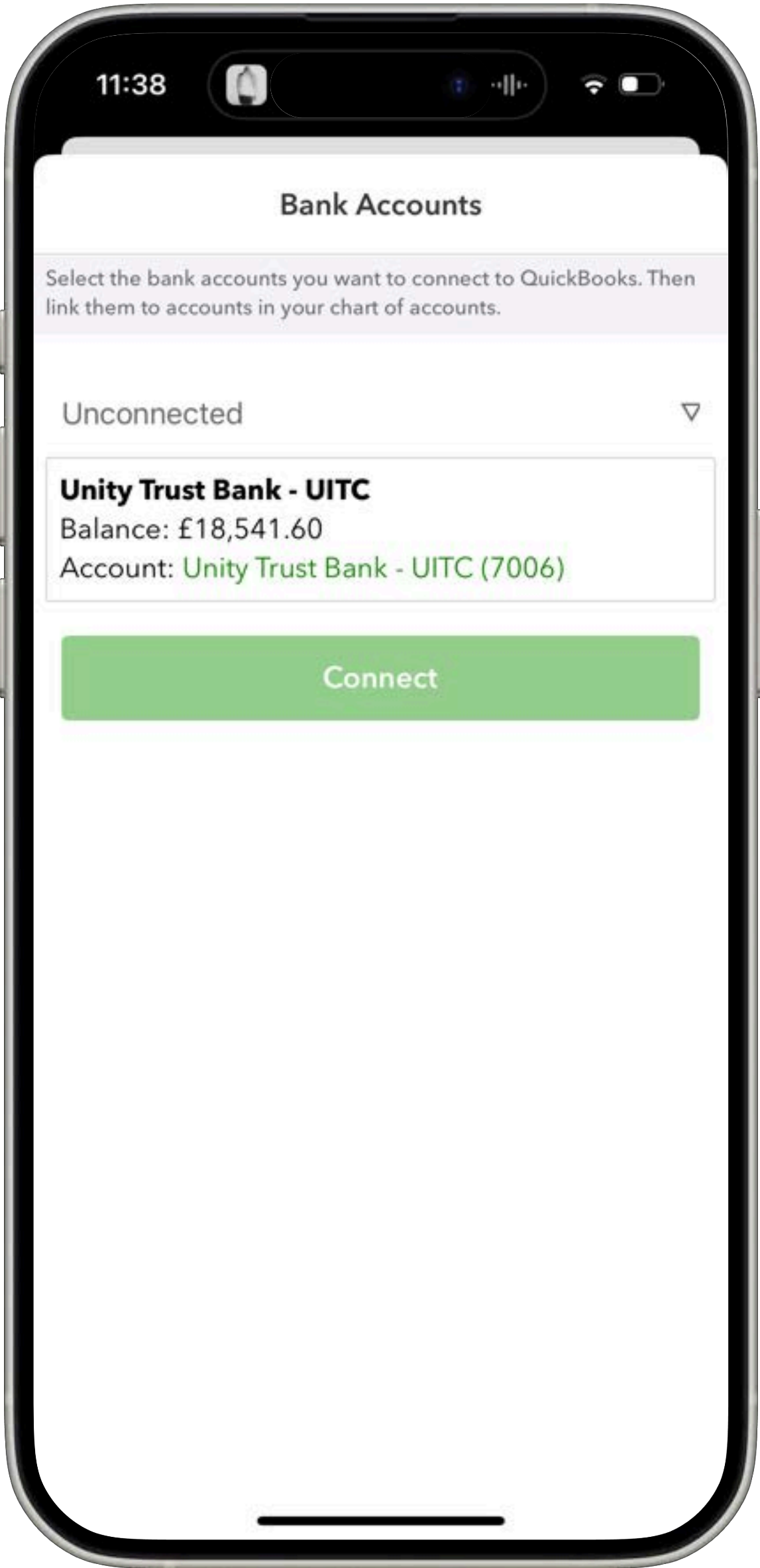
You will be asked to open your Token application. Upon opening the application, you will be prompted to confirm and approve the recent request.



Step 7: Select Account and Review information

Once you select the above account you will be asked to provide any further information related to the account.

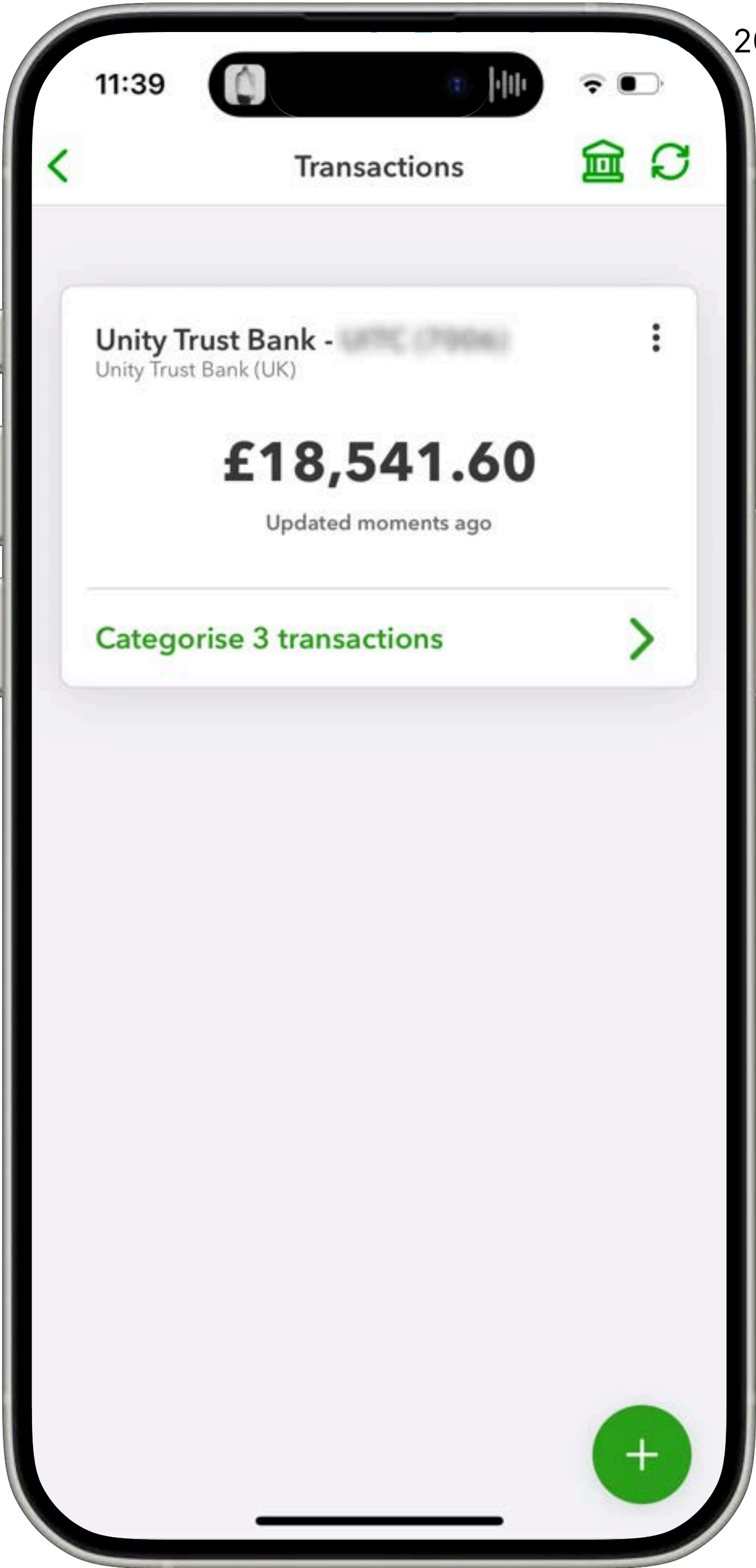
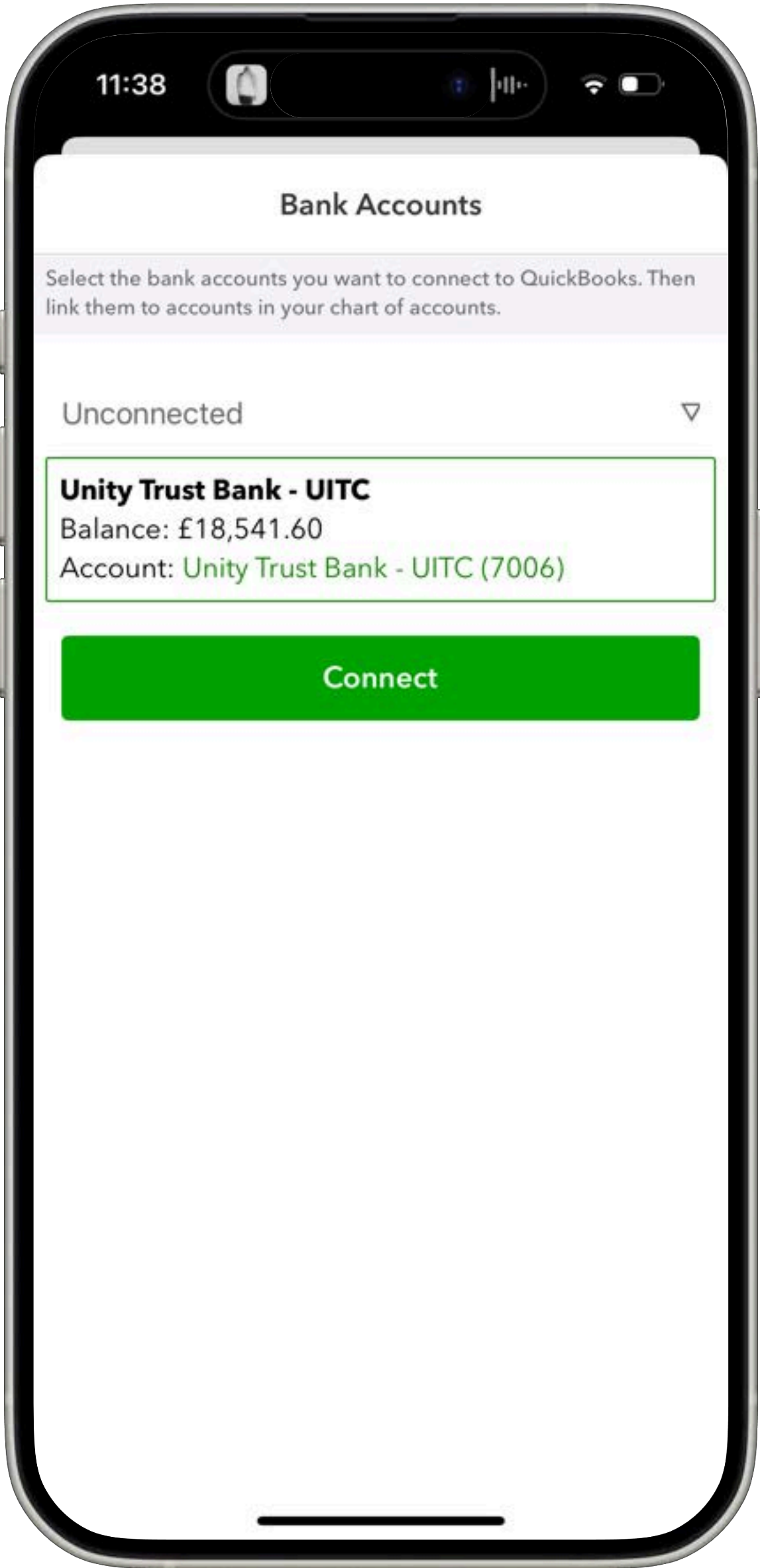
Once you select the above account you will be asked to provide any further information related to the account. If the information is correct you can press 'Save'.



Step 8: Connect your account

After saving, you can now connect your account to Quickbooks.

Once you have select the 'Connect' button you will be automatically taken to the 'Transactions' page where you can view the account details or add another account.



Help and support

Contact Unity Trust Bank support

Telephone: 0345 140 1000

Our call centre is open Monday to Friday 9:00am to 5:00pm.

Visit support.token.io

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4th Floor

London, EC3A 8BE

United Kingdom

info@token.io

Additional Help and Support

More information and answers to Frequently Asked Questions around software integrations with Unity Trust Bank are available here: www.unity.co.uk/accounting-software