## Coast Capital – QuickBooks Guide

Re-establishing connection with QuickBooks

## Step-by step instructions to re-establish connection with QuickBooks, after you have migrated to Coast Capital's new digital banking platform.

## In the QuickBooks platform:

1. Login into QuickBooks (web version), and select the **Banking** tab:



2. Select the existing Coast Capital account; then select Edit account info:



3. Select Disconnect this account on save; then select Save and Close

		*Name
Bank	•	Deposit-for-free - Business XXXXXXXX6471
Detail Type		Description
Chequing	•	
Use Chequing accounts chequing activity, includ transactions.	to track all your ing debit card	Is sub-account Enter parent account
Each chequing account your o has at a bank or other financia should have its own Chequing account in QuickBooks Online	your company nancial institution quing type Online EasyStart.	Balance 0.49
		Connected to Coast Business Savings at Coast Capital Savings (Canada) ✔ Disconnect this account on save

4. Repeat steps 1 through 3 for all other linked accounts.



## 5. Select Add account



- 6. Type Coast in the search bar, select Coast Capital Savings
- 7. Enter your Username and Password for Coast Capital, then select Continue
- 8. If asked, complete the reCAPTCHA to confirm you are not a robot, then select Continue
- Select Yes when asked if you would like to trigger a security code, then Continue.
  A one-time password will be delivered to your phone or email, enter the verification code into QuickBooks

C	Coast Capital Savinge (Canada) https://www.coastcapitalsavings.com/ 1-250-380-3100
• 10+1110 - 11 - 11 - 11 - 11 - 11	
lease enter th	ne code that you have received
frough phone	
Verification Co	de

\*The one-time password will be delivered to your phone or email, depending on the method you have selected in your digital banking platform with Coast Capital.

10. Select all the accounts you would like linked to QuickBooks and select the account type in the drop down.



11. Select Connect once you have selected the appropriate accounts. This will complete the set-up.

