

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:

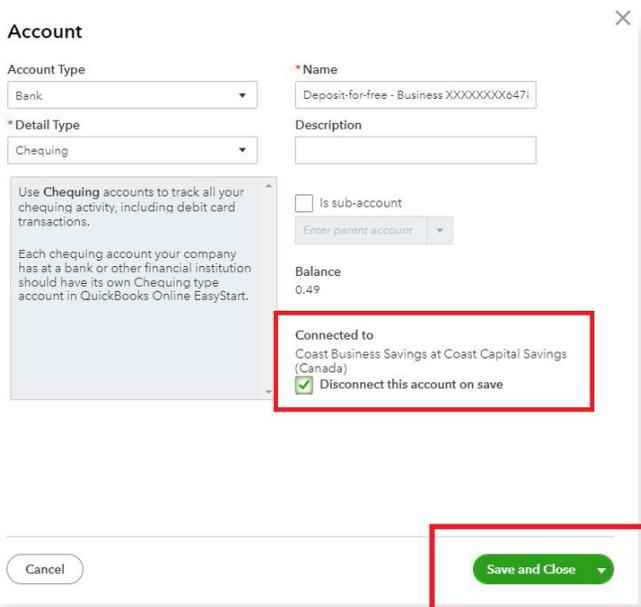
1. Login into QuickBooks (web version), and select the **Banking** tab:



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

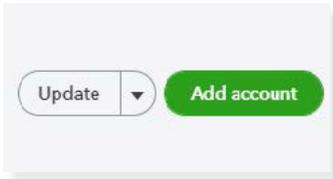


3. Select **Disconnect this account on save**; then select **Save and Close**



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

5. Select **Add account**



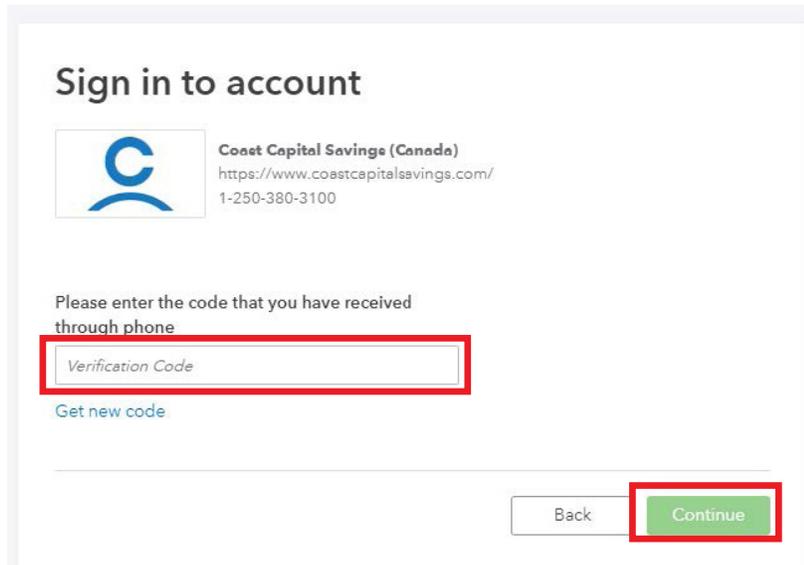
6. Type **Coast** in the search bar, select **Coast Capital Savings**

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**

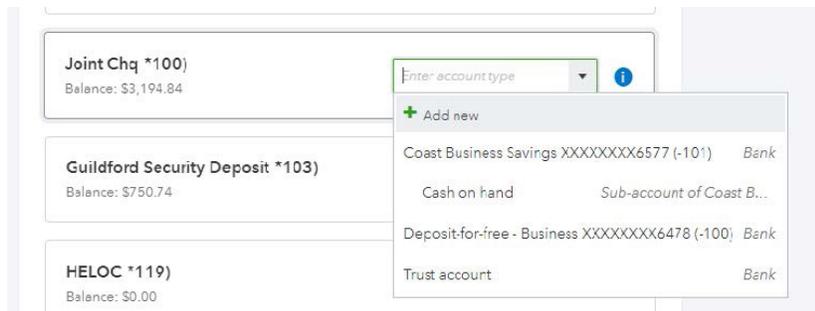
9. Select **Yes** when asked if you would like to trigger a security code, then **Continue**.

A one-time password will be delivered to your phone or email*, **enter the verification code into QuickBooks**



**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.