QuickBooks Online Conversion Instructions

As Seacoast Bank completes our online banking upgrade, you will need to modify your QuickBooks Online settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for both connectivity types (Express Web Connect and Web Connect).

To navigate this document, just click the link below that matches your product connectivity:

Instructions for One-Step Update initiated from within QuickBooks Online

Instructions for Downloading a Web Connect file from your Online Banking Site

QuickBooks Online Express Web Connect

On January 28th:

1. Complete a final transaction download.
2. Complete last transaction update before the change to get all of your transaction history up to date.
3. Accept all new transactions into the appropriate registers.

On February 9th:

1. Disconnect online banking connection for accounts connected to Seacoast Bank.
   a. Select **Banking** from the left column.
   b. Click on the account you would like to disconnect, then click the **Pencil** Icon on the corner of that account box.
   c. Click **Edit Account Info**.
   d. Check the box next to **Disconnect this Account on Save**.
   e. Click **Save and Close**.
   f. Repeat steps for any additional accounts that apply.
2. Reconnect online banking connection for accounts that apply.
   a. Download a Web Connect file (.qbo or .qfx) from the Seacoast Bank Online Banking site.
   b. In QuickBooks Online, choose **Banking** from the left column.
   c. Click **File Upload** in the upper-right side of the screen and use the upload dialog to locate the Web Connect file you downloaded in step a.
   d. Choose the appropriate account from the drop-down menu under **QuickBooks Account** and then click **Next**.
   Important: Do NOT choose "+Add New" in the drop-down menu unless you intend to add a new account to QuickBooks Online.
   e. When the import is finished, click **Let's go!**
   f. Review the For Review tab on the Banking page to view what was downloaded.
   g. Click **Next**, and then click **Done**.
   h. Repeat this step for each account that you have connected to Seacoast Bank.

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