



Stonebridge Bank QuickBooks® Instructions

1. Log into your QuickBooks® application on your own computer
2. Log into your online Stonebridge Business Account.
3. View the Stonebridge Bank Current Balance screen
4. Click on the QuickBooks® link located on the bottom left hand navigation
5. The Export Specification screen will appear – Select the accounts and configure the data you wish to export
6. Click on “Export Transactions” box located at the bottom/middle of the screen
7. The “Opening History.qbo” screen will appear
8. Click “Open”
9. The download screen will appear – wait for your computer to complete the download process. When the download process has completed, a “Web Connect Menu” screen will appear with a message reading, “Your Web Connect data successfully read into QuickBooks®”.
10. From this point, all other transactions are a function of QuickBooks®. Please refer to your QuickBooks® program for further instruction.
11. Note: If you receive a message that reads, “No new transactions available, please check again tomorrow” – This message indicates that there is no updated bank information available for downloading.

Contact Stonebridge Customer Service at 1-800-807-1666 for more information.