

# Quicken for Windows Conversion Instructions

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*Quicken for Windows 2014-2016*

*Direct Connect to Express Web Connect*

## Introduction

As **Valley Bank and Trust Co. / Western States Bank** completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your **User ID and Password** for the **Valley Bank and Trust Co. / Western States Bank** website.

**NOTE:** Quicken Web Connect/Express Web Connect accounts use the same User ID and PIN/Password as **Western States Bank** website.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

## Documentation and Procedures

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### Task 1: Conversion Preparation

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1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Quicken Help**. Search for **Backup Data File** and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Quicken Help**. Search for **Update Software** and follow the instructions.

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### Task 2: Connect to **Valley Bank and Trust Co. / Western States Bank** for a final download before **June 17<sup>th</sup>, 2016**.

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1. Choose **Tools** menu > **One Step Update**.
2. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.
3. In the **One Step Update Settings** dialog, make sure all items are checked and click **Update Now**.
4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

**NOTE:** If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

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**Task 3:** Deactivate Your Account(s) At **Valley Bank and Trust Co. / Western States Bank** on or after **June 20<sup>th</sup>, 2016**.

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1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click on **Deactivate** or **Deactivate Online Payment** (only available if you use bill pay services). Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. Repeat steps 2 – 6 for each account at **Valley Bank and Trust Co. / Western States Bank**.
8. Backup your data file.

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**Task 4:** Re-activate Your Account(s) at **Western States Bank** on or after **June 20<sup>th</sup>, 2016**.

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1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to activate.
3. In the Account Details dialog, click on the **Online Services** tab.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter **Western States Bank** and click **Next**.
7. If presented with the Select Connection Method screen, select **Express Web Connect**.
8. Enter your **User ID** and **Password**. Click **Connect**.

**NOTE:** You may be presented with a security question from your Financial Institutions prior to receiving your accounts.

9. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching accounts in the drop-down menu.

**IMPORTANT:** Do **NOT** select **Add to Quicken** unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
11. Click **Done** or **Finish**.

*Thank you for making these important changes!*