# Quicken for Windows Conversion Instructions

*Quicken for Windows 2011–2014*

*Web Connect*

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# Introduction

As 1st Bank Yuma completes its system upgrade, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your login credentials for the *1st Bank Yuma* websites.

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.

| NOTE: | This update is time sensitive and can be completed on or before August 1st. |
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# Documentation and Procedures

### Task 1:   Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for *Backing Up Your Data* and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for *Checking for Updates to Quicken* and follow the instructions.

### Task 2:   Connect to 1st Bank Yuma on or before August 1, 2014

3. Log in to 1st Bank Yuma's website at https://www.1stbankyuma.com/. Download all of your transactions into Quicken.

4. Once the transactions are downloaded, accept all transactions into your Quicken account register.

5. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

## Task 3:   Deactivate Your Account(s) At 1<sup>st</sup> Bank Yuma after August 1, 2014

1. Choose **Tools** menu > **Account List**.

2. Click the **Edit** or **Edit Details** button of the account you want to deactivate.

3. In the **Account Details** dialog, click on the **Online Services** tab.

4. Click **Deactivate** or **Remove from One Step Update**. Follow the prompts to confirm the deactivation.

> **NOTE:**        The name of the buttons referenced above may vary depending on the services and the version of Quicken you are using.

5. Click on the **General** or **General Information** tab. Remove the **Account Number**.

6. Remove the name of the **Financial Institution**. Click **OK** to close the window.

7. Repeat steps 2–6 for each account at *1<sup>st</sup> Bank Yuma*.

## Task 4:   Re-activate Your Account(s) at 1<sup>st</sup> Bank Yuma on or after August 4, 2014

1. Log in to *1<sup>st</sup> Bank Yuma's* web site with your login name and password*.*

2. Download and import your transactions to Quicken. Downloading history past August 1, 2014 that had previously been downloaded, will cause a duplicate history entry due to the 1<sup>st</sup> Bank Yuma upgrade.

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

> **IMPORTANT:**    Do **NOT** select **Create a new account** or **Create a new Quicken account**.  If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.

4. Repeat steps 2 – 3 for all of your accounts

*Thank you for making these important changes!*