

# Quicken for Windows Conversion Instructions

---



*Quicken for Windows 2013-2015*

*Direct Connect to Web Connect*

## Introduction

As **Bank of Santa Clarita** completes its system conversion to a new updated internet banking system, 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 Bank of Santa Clarita's 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.



This detour symbol indicates section instructions that are using bill pay in Quicken only. If you do **not** use Quicken to make online bill payments, you can skip these sections or steps.

## Documentation and Procedures

---

### Task 1: Conversion Preparation

---

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.

---

### Task 2: Connect to **Bank of Santa Clarita** for a final download before **9/14/2016**.

---

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.

---

**Task 3:** Cancel Outstanding Payments before **9/14/2016**.

---



If you are not a Bill Pay user in Quicken, skip this Task.

**IMPORTANT:** This step must be completed by **9/14/2016** to avoid possible duplicate payment. If you do not cancel payments scheduled to be paid after **9/14/16**, it is possible these payments will still be processed.

1. Choose **Tools** menu > **Online Center**.
2. Select **Bank of Santa Clarita** from the **Financial Institution** drop-down list.
3. On the **Payments** tab, select an account from which a payment is scheduled in the future.

**NOTE:** Click **Print** to save your list of pending payments. You can use this when you recreate and send these payments later.

4. In the payment status list, you will cancel payments for each payee with a status that is schedule for delivery on a date after **9/14/2016**. To do this, select the first payee and click **Cancel Payment**.
5. Perform steps 3 & 4 for all payments scheduled for delivery on a date after 9/14/2016.
6. On the toolbar, choose **Repeating**.
7. Select a payment instruction and click **Delete**. You will need to click **Delete** again in a confirmation window.
8. Repeat step 7 for each repeating payment instruction you have with your financial institution.

---

**Task 4:** Deactivate Your Account(s) at **Bank of Santa Clarita** on or after **9/19/2016**.

---

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 for each account you are deactivating.
8. Backup your data file.

---

**Task 5:** Re-activate Your Account(s) at **Bank of Santa Clarita** on or after **9/19/2016**.

---

1. Download your Quicken Web Connect file from [www.bankofsantaclarita.com](http://www.bankofsantaclarita.com).

**IMPORTANT:** Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

2. Click **File > File Import > Web Connect File**. Locate and select the Web Connect file to import.
3. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

**IMPORTANT:** Do **NOT** select **Create a new account** 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** or click the **Cancel** button.

4. Repeat steps for each account you wish to reactivate in Quicken.

*Thank you for making these important changes!*