Quicken for Windows Conversion Instructions

Conversion Preparation

- 1. Backup your data file. For instructions to back up your data file, choose Help menu → **Search**. Search for and select "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 and select "Checking for updates to Quicken" and follow the instructions.

Deactivate Your Account(s)

- 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.



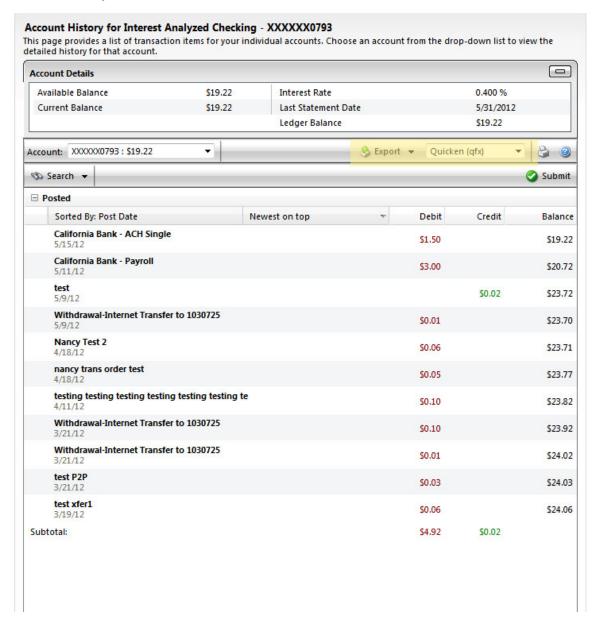
Note: The name of the buttons referenced above may vary depending on the services you currently use and version of Quicken.

- 5. Click on the **General** or **General Information** tab. Delete the Account Number.
- **6.** Delete the name of the Financial Institution. Click **OK** to close the window.
- 7. Repeat steps 2 7 for each account at California Bank of Commerce

Re-activate Your Account(s) At California Bank of Commerce

1. Log in to California Bank of Commerce's web site at https://www.californiabankofcommerce.com

2. Download your transactions to Quicken.



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.



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
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