

# 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.

**Account History for Interest Analyzed Checking - XXXXXX0793**  
This page provides a list of transaction items for your individual accounts. Choose an account from the drop-down list to view the detailed history for that account.

Account Details			
Available Balance	\$19.22	Interest Rate	0.400 %
Current Balance	\$19.22	Last Statement Date	5/31/2012
		Ledger Balance	\$19.22

Account: XXXXXX0793 : \$19.22    Export    Quicken (qfx)    Submit

Search    Submit

Posted

Sorted By: Post Date	Newest on top	Debit	Credit	Balance
California Bank - ACH Single 5/15/12		\$1.50		\$19.22
California Bank - Payroll 5/11/12		\$3.00		\$20.72
test 5/9/12			\$0.02	\$23.72
Withdrawal-Internet Transfer to 1030725 5/9/12		\$0.01		\$23.70
Nancy Test 2 4/18/12		\$0.06		\$23.71
nancy trans order test 4/18/12		\$0.05		\$23.77
testing testing testing testing testing testing te 4/11/12		\$0.10		\$23.82
Withdrawal-Internet Transfer to 1030725 3/21/12		\$0.10		\$23.92
Withdrawal-Internet Transfer to 1030725 3/21/12		\$0.01		\$24.02
test P2P 3/21/12		\$0.03		\$24.03
test xfer1 3/19/12		\$0.06		\$24.06
Subtotal:		\$4.92	\$0.02	

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!**