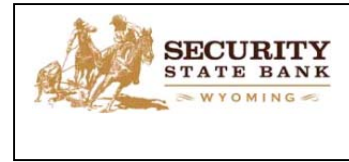# QuickBooks for Windows Conversion Instructions

QuickBooks Windows

Web Connect

Introduction

As *Security State Bank WY* completes its system conversion*,* you will need to modify your QuickBooks 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 *Security State Bank WY* 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.

Documentation and Procedures

Task 1: Deactivate Your Account(s) at *Security State Bank WY* on or after *October 17, 2016*

> **NOTE:** All transactions must be matched or added to the register prior to deactivating your account(s).

1. Choose the **Lists menu** > **Chart of Accounts**.

2. Select the account you want to deactivate.

3. Click **Edit menu** > **Edit Account**.

4. Click on the **Bank Feed Settings** tab in the Edit Account window.

5. Select **Deactivate All Online Services** and click **Save & Close**.

6. Click **OK** for any dialog boxes that may appear with the deactivation.

7. Repeat steps 2 – 6 for each account at *Security State Bank WY.*

Task 2: Re-activate Your Account(s) at *Security State Bank WY* on or after *October 17, 2016*

1. Log in to *https://www.ssbwyo.bank* and download your QuickBooks Web Connect file.

2. Click **File** > **Utilities** > **Import** > **Web Connect Files**.

> **IMPORTANT:** Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

3. If prompted for connectivity type, select **Web Connect**.

4. Click the **Import new transactions now** radio button, then click **OK**.

> **NOTE:** If you previously removed the check from the "Always give me the option of saving to a file..." option, then this dialog will not display.

5. In the **Select Bank Account** dialog, click **Use an existing QuickBooks** account.

6. In the corresponding drop-down list, select your QuickBooks account, and click **Continue**.

7. Confirm the prompt by clicking **OK**.

8. Repeat steps 1 - 7 for each account that you previously disabled.

> **IMPORTANT:** Verify that all transactions downloaded successfully into your account registers.

Task 3: Re-enable Express Mode (if necessary)

> **NOTE:** If you prefer Classic Mode (Register Mode), you are finished with your conversion. If you use Express Mode for online banking, you may now re-enable the mode.

For instructions to enable Express Mode, choose **Help** > **QuickBooks Help**. Search for **Banking Feed Modes**, then select **Bank Feed Modes overview**, and follow the instructions.

Thank you for making these important changes!