

# QuickBooks for Windows Conversion Instructions

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## *QuickBooks for Windows 2012–2014*

### *Direct Connect*

As **Essex Savings Bank** completes its online banking update, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your **[User ID and Password]** for the **Essex Savings Bank** 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.

**NOTE:** This update is time sensitive and can be completed on or after **[8/12/2014]**.

## Documentation and Procedures

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### **Task 1: Conversion Preparation**

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1. Backup your data file. For instructions to back up your data file, choose **Help menu >> QuickBooks Help**. Search for **Back Up** and follow the instructions.
2. Download the latest QuickBooks update. For instructions to download an update, choose **Help menu >> QuickBooks Help**. Search for **Update QuickBooks**, then select **Updating QuickBooks** or **Update QuickBooks** and follow the instructions.

**IMPORTANT:** If multiple computers do not use the same QuickBooks data file, skip step 3.

3. Switch to single user mode.  
For instructions to switch to single user mode, choose **Help menu >> QuickBooks Help**. Search for **Switch to Single User Mode** and follow the instructions.

**IMPORTANT:** If you are not using Register Mode, enable it for the conversion. You can change it back after the conversion is complete.

4. Enable Register Mode.

5. For instructions to enable register mode, choose **Help menu >> QuickBooks Help**. Search for **Online Banking Modes**, then select **Online Banking Modes overview**, scroll down, and follow the instructions.

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**Task 2: Match Downloaded Transactions**

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If new transactions were received from your connection, accept all new transactions into the appropriate registers.

If you need assistance matching transactions, choose **Help menu >> QuickBooks Help**. Search for **Matching Transactions** and follow the instructions.

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**Task 3: Deactivate Your Account(s)**

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

1. Choose **Lists menu >> Chart of Accounts**.
2. Select the account you want to deactivate.
3. Choose **Edit menu >> Edit Account**.
4. Click on the **Online Services** tab in the Edit Account window. The tab is named **Bank Feed Settings** in QuickBooks **2014**.
5. Select **Deactivate All Online Services** and click **Save & Close**.
6. Click **OK** for any dialog boxes that may appear with the deactivation.  
Repeat steps 2 – 6 for each account at **Essex Savings Bank**.

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**Task 4: Re-activate Your Account(s) at Essex Savings Bank**

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1. Choose **Banking** menu → **Online Banking** → **Set Up Account for Online Services**. In QuickBooks **2014** choose **Banking** menu → **Bank Feeds** → **Setup Bank Feed for an Account**.
1. Select an account to activate.
2. Choose **Essex Savings Bank** and click **Next**.
3. Follow the instructions in the wizard. If prompted for connectivity type, select **Direct Connect**.
4. Match to the appropriate account and click **Finish**.
5. Repeat steps 1 – 5 for all accounts at **Essex Savings Bank**.

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**Task 5: Re-enable Side by Side Mode**

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**NOTE:** If you prefer register mode, you can skip to the next section. If you use the Side by Side mode for online banking, you may now re-enable the mode. Now known as **Express Mode** under Bank Feeds Center in QuickBooks **2014**

1. For instructions to enable Side by Side mode, choose **Help** menu >> **QuickBooks Help**. Search for **Online Banking Modes**, then select **Online Banking Modes overview**, scroll down, and follow the instructions.
2. For QuickBooks 2014, locate **Bank Feeds** within Checking **Company Preferences** found in the **Edit** menu > **Preferences**.

*Thank you for making these important changes!*