



QuickBooks for Windows Conversion Instructions

QuickBooks Windows 2013-2016

Web Connect

Introduction

As **Star Choice Credit Union** 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 **Star Choice Credit Union** 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.

Documentation and Procedures

Task 1: Conversion Preparation

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 **Update QuickBooks** and follow the instructions.

NOTE: If multiple computers do not use the same QuickBooks data file, skip step 3. QuickBooks activities such as **Online Banking** cannot be performed in multi-user mode because of the way the activities interact with a company data file.

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.

NOTE: 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. (Classic Mode in QuickBooks 2014 and newer).
5. For instructions to enable Register Mode, choose **Help** menu > **QuickBooks Help**. Search for **Banking Feed Modes**, select **Bank Feeds Modes overview**, scroll down, and follow the instructions.

6. Link your bank account with the existing QuickBooks account and click **Continue**.
7. Repeat steps 1 - 3 for each account with **Star Choice Credit Union**

Task 2: Deactivate Your Account(s) at **Star Choice Credit Union** on or after **4/25/2016**

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 **Online Services** tab in the Edit Account window. The tab is named **Bank Feed Settings** in QuickBooks 2014 and newer.
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 **Star Choice Credit Union**

Task 3: Re-activate Your Account(s) at **Star Choice Credit Union - NEW** on or after **4/25/2016**

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to activate.
3. In the Account Details dialog, click on the **Online Services** tab.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter **Star Choice Credit Union** and click **Next**.
7. If presented with the Select Connection Method screen, select **Direct Connect**.
8. Type your Direct Connect **User ID** and **Password** and click **Connect**.
9. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching accounts in the drop-down menu.

IMPORTANT: Do **NOT** select **Add to Quicken** unless you want 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**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
11. Click **Done** or **Finish**.

For instructions to enable Side by Side mode (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!