



QUICKEN
CONVERSION INSTRUCTIONS

As Texas Citizens Bank “TCB” completes its system conversion with b1BANK, you will need to modify your Quicken settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for Direct Connect, Express Web Connect, and Web Connect.

QUICKEN WINDOWS DIRECT CONNECT AND EXPRESS WEB CONNECT

1st Action Date: July 22, 2022

1. Back up your Quicken Windows Data File. Go to **File > Backup and Restore > Backup Quicken File**.
2. Download the latest Quicken Update. Go to **Help > Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

2nd Action Date: July 25, 2022

1. Deactivate online banking connection for accounts connected to TCB.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Financial Institution and Account Number information. Click **OK** to close window.
 - g. Repeat steps for any additional accounts that apply.

Important: To avoid duplicate transactions, go to **Edit > Preferences > Downloaded Transactions > Disable Automatically add to banking registers**. Once you have downloaded and verified all transactions, you can go back to **Edit > Preferences > Downloaded Transactions > Enable Automatically add to banking registers**.

2. Reconnect the online banking connection for your accounts.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account you want to activate.
 - c. In Account Details, click **Online Services** and then choose **Set up Now**.
 - d. Type ‘b1BANK’ in the search field and click Next.
 - e. Enter your b1BANK credentials. If this is your initial login to b1BANK’s Online Banking, please click [here](#) for detailed login instructions.
 - Express Web Connect uses the same credentials you use for your institution’s online banking login.
 - Direct Connect might require credentials that do not match your online banking credentials.

Important: If your credentials do not work, contact b1BANK.

- f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu.

Important: Do NOT choose “Create a new account” unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, choose **Ignore – Don’t Download into Quicken** or click **Cancel**.

- g. After all accounts have been matched, click **Next** and then **Done**.

QUICKEN MAC DIRECT CONNECT AND QUICKEN CONNECT

1st Action Date: July 22, 2022

1. Backup Quicken Mac Data File and Update the application.
 - a. Choose **File > Save a Backup**.
 - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Accept all new transactions into the appropriate registers.

2nd Action Date: July 25, 2022

Important: To avoid duplicate transactions, go to **Edit > Preferences > Downloaded Transactions > Disable Automatically add to banking registers**. Once you have downloaded and verified all transactions, you can go back to **Edit > Preferences > Downloaded Transactions > Enable Automatically add to banking registers**.

Activate the online banking connection for accounts connected to the financial institution that is requesting this change.

1. Click your account in the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter 'b1BANK' in the search field, select the correct option and click Continue.
5. Enter your b1BANK credentials. If this is your initial login to b1BANK's Online Banking, please click [here](#) for detailed login instructions.
 - Express Web Connect uses the same credentials you use for your institution's online banking login.
 - Direct Connect might require credentials that do not match your online banking credentials.

Important: If your credentials do not work, contact b1BANK.

6. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under Action, choose **Link** to pick your existing account.

Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.
7. Click **Finish**.

QUICKEN WINDOWS WEB CONNECT

1st Action Date: July 22, 2022

1. Backup Quicken Windows Data File and Update.
 - a. Choose **File > Backup and Restore > Backup Quicken File**.
 - b. Download the latest Quicken Update. Choose **Help > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Repeat this step for each account you need to update.

- c. Accept all new transactions into the appropriate registers.

2nd Action Date: July 25, 2022

1. Deactivate online banking connection for accounts connected to TCB.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Financial Institution and Account Number information.
 - g. Click **OK** to close window.
 - h. Repeat steps for any additional accounts.
2. Reconnect online banking connection for accounts that apply.
 - a. Download a Quicken Web Connect file from your financial institution's online banking site.
 - b. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
 - c. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
 - d. Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
 - e. Repeat this step for each account you have connected to this institution.

QUICKEN MAC WEB CONNECT

1st Action Date: July 22, 2022

1. Backup your Quicken Mac data file and update the application.
 - a. Choose **File > Save a Backup**.
 - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Repeat this step for each account you need to update.
 - c. Accept all new transactions into the appropriate registers.

2nd Action Date: July 25, 2022

Activate online banking connection for accounts connected to financial institution that is requesting this change.

1. Select your account under the Accounts list on the left side.
 2. Choose **Accounts > Settings**.
 3. Select **Set up transaction download**.
 4. Enter 'b1BANK' in the search field, select the correct option and click **Continue**.
 5. Log into b1BANK's Online Banking site and download your transactions to your computer. is your initial login to b1BANK's Online Banking, please click [here](#) for detailed login instructions.
- 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.

6. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web Connect** for the “Connection Type” if prompted
7. In the “Accounts Found” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, click **Link** to pick your existing account.
Important: Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken.
8. Click **Finish**.