



EAST WEST BANK

**End User Migration Instructions**  
INTUIT QUICKEN (WINDOWS/MAC) / [QUICKBOOKS](#)

As [East West Bank](#) completes a system migration, you will need to modify certain information in your [Quicken/QuickBooks](#) software to ensure a smooth transition of your data. You must complete the following steps *after* the conversion date: **August 15, 2008**.

**To ensure that your Personal Financial Management Banking service is updated properly, kindly follow the enclosed instructions in the exact order that it is presented.**

If you have any questions regarding these instructions, please contact us at [\(888\) 895-5650](#), and an East West Bank customer service representative will be available to assist you from **8:00 a.m. to 8:00 pm on Monday to Friday and 9:00 a.m. to 5:00 p.m. on Saturday**.

You may also visit the [East West Bank](#) website at [www.eastwestbank.com](http://www.eastwestbank.com) to obtain a copy of the instruction.

**Select your software version from this index to access instructions for your online accounts within Quicken (WIN/MAC) / [QUICKBOOKS](#).**

[Quicken Windows 2007-2008](#)

[Quicken Windows 2006](#)

[Quicken MAC 2007](#)

[Quicken MAC 2006](#)

[QuickBooks 2008](#)

[QuickBooks 2006 - 2007](#)



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### Quicken Windows 2007-2008 Instructions

#### STEP A.

#### INSTALL THE LATEST QUICKEN UPDATE

Follow the steps in this section to determine if a Quicken update is available and to download the update.

1. From the Quicken **Online** menu, choose **One Step Update**.
2. Uncheck all options in the One Step Update dialog boxes and click **Update Now**.
3. If an update is available, apply it now.
4. Exit and restart Quicken.

For more information, see <http://www.intuit.com/support/quicken/updates/>.

#### STEP B.

#### BACK UP YOUR CURRENT QUICKEN DATA

From the Quicken **File** menu, choose **Backup**, enter information, as needed in the Quicken Backup dialog boxes, and then click **OK**.

Do not restore to any earlier backups after you complete these instructions.

#### STEP C.

#### DEACTIVATE YOUR ACCOUNTS

1. Open the register for the first account at East West Bank.
2. Click the **Overview** tab.
3. Before you continue, it is important that you record your account information. From this window you will see your **Account Number**, **Routing Number**, and **Customer ID**. Write this information down so you have it later, or choose **File, Print Overview**.
4. In the Account Attributes area, click **Change Online Services**.
5. Click **Remove from One Step Update** in the One Step Update.
6. Click **Yes** when the "Would you like to deactivate this service?" message appears
7. Click **Yes** to continue and then **OK**
8. Repeat steps 1-7 for all accounts enabled for online access.
9. To ensure all online accounts have been disabled, go to the **Tools** menu, **Account List** and verify the word 'Activated' does not appear in the Online



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Services column for all your East West Bank accounts. Close this screen by clicking the 'X' on the top right corner of this page.

### STEP D.

### REACTIVATE YOUR ACCOUNT(S)

1. Open the register for the first account at East West Bank
2. Click the **Overview** tab
3. In the account attributes area, click **Change Online Services**.
4. Click the **Online Services** tab.
5. To activate Transaction Download, click **Activate One Step Update** in the One Step Update area.
6. Enter the Direct Connect User ID and PIN and click **Next**. Follow the instructions to match the existing account and add new accounts, as applicable.
7. Repeat steps 1-6 until all East West Bank accounts have been activated.

#### **If you use the Quicken PIN Vault, update it now.**

If you use the Quicken PIN Vault, you will need to re-add your PIN for [East West Bank](#).

1. From the Quicken **Online** menu, choose **Password Vault** and then choose **Edit**.
2. In the PIN Vault Password dialog box, enter your PIN Vault Password and then click **OK**.
3. Select the User ID at [East West Bank](#) and click **Add Password**
4. In the "Add a Password" dialog box, enter your [East West Bank](#) PIN, re-enter your [East West Bank](#) PIN, and then click **Add**.
5. Click **Done**.

### STEP E.

### GO ONLINE

1. From the Quicken **Online** menu, choose **Online Center**.
2. In the Online Center window, click **Update/Send**.
3. Click **Update Now** to continue and then wait until your online session is completed



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### Quicken Windows 2006 Instructions

#### STEP A.

#### INSTALL THE LATEST QUICKEN UPDATE

Follow the steps in this section to determine if a Quicken update is available and to download the update.

1. From the Quicken **Online** menu, choose **One Step Update**.
2. Uncheck all options in the One Step Update dialog boxes and click **Update Now**.
3. If an update is available, apply it now.
4. Exit and restart Quicken.

For more information, see <http://www.intuit.com/support/quicken/updates/>.

#### STEP B.

#### BACK UP YOUR CURRENT QUICKEN DATA

From the Quicken **File** menu, choose **Backup**, enter information, as needed in the Quicken Backup dialog boxes, and then click **OK**.

Do not restore to any earlier backups after you complete these instructions.

#### STEP C.

#### DEACTIVATE YOUR ACCOUNTS

1. Open the register for the first account at East West Bank.
2. Click the **Overview** tab.
3. Before you continue, it is important that you record your account information. From this window you will see your **Account Number**, **Routing Number**, and **Customer ID**. Write this information down so you have it later, or choose **File, Print Overview**.
4. In the Account Attributes area, click **Change Online Services**.
5. Click **Deactivate** in the Transaction Download area and then click **Yes** in the pop-up dialog box to confirm.  
You will receive the message: "You are about to delete setup information for an online account." Click **OK**. Click **OK** again.
6. Repeat steps 1-5 for all accounts enabled for online access.
7. To ensure all online accounts have been disabled, go to the **Tools** menu, **Account List** and verify the word 'Activated' does not appear in the Online Services column for all your East West Bank accounts. Close this screen by clicking the 'X' on the top right corner of this page.



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## STEP D.

## REACTIVATE YOUR ACCOUNT(S)

1. Open the register for the first account at East West Bank
2. Click the **Overview** tab
3. In the account attributes area, click **Edit Account Details**.
4. Click the **Online Services** tab.
5. To activate Transaction Download, click **Activate** in the Transaction Download area. Enter the Direct Connect User ID and PIN and click **Next**. Follow the in-screen instructions to match the existing account and add new accounts, as applicable.
6. Repeat steps 1-5 until all East West Bank accounts have been activated.

### **If you use the Quicken PIN Vault, update it now.**

If you use the Quicken PIN Vault, you will need to re-add your PIN for [East West Bank](#).

1. From the Quicken **Online** menu, choose **PIN Vault** and then choose **Edit**.
2. In the PIN Vault Password dialog box, enter your PIN Vault Password and then click **OK**.
3. Select your first account at [East West Bank](#) by clicking the account number.
4. Click **Add PIN**.
5. In the Change A PIN dialog box, enter your [East West Bank](#) PIN, re-enter your [East West Bank](#) PIN, and then click **Add**.
6. Click **Done**.
7. Repeat steps 3 – 6 for each account at [East West Bank](#)

## STEP E.

## GO ONLINE

1. From the Quicken **Cash Flow** menu, choose **Online Center**.
2. In the Online Center window, click **Update/Send**.
3. Click **Update Now** to continue and then wait until your online session is completed



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### Quicken MAC 2007 Instructions

#### STEP A

#### INSTALL THE LATEST QUICKEN 2007 UPDATE

1. From the **Quicken 2007** menu, choose **Check for Updates**.
2. If an update is available, you will be prompted to go to <http://www.intuit.com/support/quicken/updates> and follow the instructions to update to the latest version of Quicken.
3. Quit and restart Quicken.

#### STEP B

#### BACK UP YOUR CURRENT QUICKEN DATA

From the **File** menu, choose **Save a Copy**, and then click **OK**.

#### STEP C

#### DEACTIVATE YOUR ACCOUNTS

**Note: All transactions must be accepted in the account register before accounts can be deactivated.**

1. From the **Lists** menu, select **Accounts**.
2. Select the account you want to disable and click **Edit**. This will open the Edit Account sheet.
3. In the **Download transactions** dropdown menu, select **not enabled**. You will receive the message: "You are about to disable online services for this account within Quicken." Click **OK**.
4. To save these changes click **OK** at the bottom of the Edit Account sheet.
5. Repeat steps 1-4 for all accounts you have enabled for online access.
6. To ensure all your online accounts have been disabled, go to the **Lists** menu, select **Accounts** and verify the blue globe does not appear next to any of your accounts.
7. Close and reopen Quicken MAC.

#### STEP D

#### REACTIVATE YOUR ACCOUNTS

1. From the **Lists** menu, select **Accounts**.
2. Select the account you just disabled and click **Edit**. This will open the Edit Account sheet.
3. Select **using direct connect** in the **Download transactions** dropdown menu.
4. Click **OK** to save your changes to this account.
5. Repeat steps 1-6 for every account.



**If you use the Quicken PIN Vault, you will need to update your [East West Bank PIN](#).**

1. From the Quicken **Online** menu, choose **PIN Vault**.
2. In the PIN Vault tab, select [East West Bank](#) and click **Edit**.
3. In the Change PIN sheet, enter your [East West Bank](#) PIN, and re-enter your [East West Bank](#) PIN, and then click **OK**.

**STEP E**

**GO ONLINE**

1. From the Quicken **Online** menu, choose **One Step Update**
2. Click on **Enter PIN**.
3. Enter the Direct Connect PIN and click **OK** and then **Update Now**



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### Quicken MAC 2006 Instructions

#### STEP A

#### INSTALL THE LATEST QUICKEN 2006 UPDATE

1. From the **Quicken 2006** menu, choose **Check for Updates**.
2. If an update is available, you will be prompted to go to <http://www.intuit.com/support/quicken/updates> and follow the instructions to update to the latest version of Quicken.
3. Quit and restart Quicken.

#### STEP B

#### BACK UP YOUR CURRENT QUICKEN DATA

From the **File** menu, choose **Save a Copy**, and then click **OK**.

#### STEP C

#### DEACTIVATE YOUR ACCOUNTS

**Note: All transactions must be accepted in the account register before accounts can be deactivated.**

1. From the **Lists** menu, select **Accounts**.
2. Select the account you want to disable and click **Edit**. This will open the Edit Account sheet.
3. In the **Download transactions** popup, select **not enabled**. You will receive the message: "You are about to disable online services for this account within Quicken." Click **OK**.
4. To save these changes click **OK** at the bottom of the Edit Account sheet.
5. Repeat steps 1-4 for all accounts you have enabled for online access.
6. To ensure all your online accounts have been disabled, go to the **Lists** menu, select **Accounts** and verify the blue globe does not appear next to any of your accounts.
7. Close and reopen Quicken MAC.

#### STEP D

#### REACTIVATE YOUR ACCOUNTS

1. From the **Lists** menu, select **Accounts**.
2. Select the account you just disabled and click **Edit**. This will open the Edit Account sheet.
3. Select **using direct connect** in the **Download transactions** dropdown menu.
4. To activate a bill payment account, select **using your financial institution** from the **pay bills online** dropdown menu.



5. Click **OK** to save your changes to this account.
6. Repeat steps 1-6 for every account.

**If you use the Quicken PIN Vault, you will need to update your [East West Bank PIN](#).**

1. From the Quicken **Online** menu, choose **PIN Vault**.
2. In the PIN Vault tab, select [East West Bank](#) and click **Edit**.
3. In the Change PIN sheet, enter your [East West Bank](#) PIN, and re-enter your [East West Bank](#) PIN, and then click **OK**.

## STEP E

## GO ONLINE

1. From the Quicken **Online** menu, choose **Download Transactions**. Make sure that [East West Bank](#) is selected from the Financial Institution popup.
2. Click **Download** and enter your Direct Connect PIN when prompted.



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## QuickBooks 2008 Instructions

### STEP A.

### INSTALL THE QUICKBOOKS UPDATE

1. From the **Help** menu, select **Update QuickBooks**.
2. Select **Update Now** and then **Get Updates**

### STEP B.

### BACKUP YOUR CURRENT QUICKBOOKS DATA

1. From the QuickBooks menu, choose **File, Save Copy or Backup**
2. Select **Backup Copy**, and click **Next**.
3. Follow the on screen instructions to back up the file.

### STEP C.

### DEACTIVATE YOUR ACCOUNTS

**Note: All transactions must be added to the account register before deactivating accounts.**

1. From the **Lists** menu select **Chart of Accounts**.
2. Select a [East west Bank](#) online account. Click the **Account** button, Select **Edit Account**.
3. The Edit Account dialog box appears. Click **Online Services** tab.
4. QuickBooks displays the Online Services window. Select **Deactivate All Online Services** and then **Save & Close**.
5. QuickBooks displays a warning message informing you that you are about to delete online setup information for a QuickBooks online account. Click **OK**
6. Repeat steps 1 through 5 until all [East west Bank](#) accounts have been disabled.
7. **CLOSE and REOPEN QuickBooks**.

### STEP D.

### REACTIVATE YOUR ACCOUNT(S)

1. From the **Banking** menu, select **Online Banking**, and then **Set Up Account for Online Services**
2. At the Select your QuickBooks account: dropdown menu, select an account and click **Next**
3. Select [East west Bank](#) from the dropdown menu and click **Next**



4. Select **Direct Connect** and click **Next**
5. Select **I have my special QuickBooks online services East west Bank PIN** and click **Next**
6. Enter Direct Connect Customer ID and password and click **Sign In**
7. Highlight the account and select **Next**
8. Click **Finish**
9. From the **Banking** menu, select **Online Banking**, and then **Set Up Account for Online Services**
10. Click **Yes** to close all windows.
11. Repeat steps 2-10 until all accounts have been activated

## STEP F.

## GO ONLINE

1. From the **Banking** menu, select **Online Banking**, and then **Online Banking Center**.
2. The Online Banking Center appears. Click **Go Online**. Enter your PIN and click **OK**.



## QuickBooks 2006 – 2007 Instructions

### STEP A.

### INSTALL THE QUICKBOOKS UPDATE

From the QuickBooks menu, choose **File, Update QuickBooks**. Follow update instructions.

### STEP B.

### BACKUP YOUR CURRENT QUICKBOOKS DATA

**Back up your current QuickBooks data.** From the QuickBooks menu, choose File, Backup, and enter a new backup filename.

### STEP C.

### DEACTIVATE YOUR ACCOUNTS

**Note: All transactions must be added to the account register before deactivating accounts.**

1. Select **Chart of Accounts** from the **List** menu.
2. Select a [East West Bank](#) online account. Click the **Account** button, Select **Edit**.
3. The Edit Account dialog box appears. Click **Online Info** tab.
4. Write down the ROUTING NUMBER, ACCOUNT NUMBER, ACCOUNT TYPE, and CUSTOMER ID. You will need this in a later step.
5. QuickBooks displays the Online Info window. Deselect **Online Account Access**. Click **OK**.
6. QuickBooks displays a warning message informing you that you are about to delete online setup information for a QuickBooks online account. Click **OK**
7. If QuickBooks displays a warning message asking you if you want to retain the online information associated with this account. Click **NO**.
8. **CLOSE and REOPEN QuickBooks.**
9. Repeat steps 1 through 8 until all [East West Bank](#) Accounts have been disabled.



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## STEP D.

## REACTIVATE YOUR ACCOUNT(S)

1. Select **Set Up Online Financial Services** from the **Banking** menu.
2. Select **Set Up Account for Online Access**. Click **Enable Accounts** tab. Click **Next**. Click **Add Financial Institution** button.
3. Select [East West Bank](#). Click the Done button and then **OK**. Click **Add to QuickBooks** button. Click **Exit** on the Browser bar. Click the dropdown arrow to the right of **I would like to enter information for my accounts**.
4. Select [East West Bank](#). Click **Next**.
5. Select **Yes I have my confirmation letter from East West Bank**. Click **Next**.
6. Enter the **Routing Number**.
7. Enter your Customer ID.
8. Click **Next**. Click the dropdown arrow to the right of **Use my existing QuickBooks account**.
9. Select your QuickBooks online Account. Click **Next**. Click the dropdown arrow to the right of [East West Bank Account Type](#).
10. Select the correct account type for this account. Type your [East West Bank](#) account number into the Account Number.
11. Select online account access and click **Next**.
12. Review the account information.
13. If you have more accounts to enable, select **Yes** next to **Do you wish to enable additional accounts?** Click **Next** and repeat these steps until all [East West Bank](#) Accounts have been enabled.
14. If you do not have more accounts to enable, select **No** next to "Do you wish to enable additional accounts?" Click **Next**.
15. QuickBooks displays the Service Agreement. Click **OK**.
16. QuickBooks asks if you wish to enable accounts at another institution.
17. Select **No**. Click **Next**.
18. QuickBooks displays a Congratulations screen. Click **Leave**.

## STEP F.

## GO ONLINE

1. Select **Online Banking Center** from the **Banking** menu.
2. The Online Banking Center appears. Click **Go Online**. Enter your PIN and click **OK**.