

Online Banking Web Connect Conversion Quicken Windows 2008-2010

As your financial institution completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your customer ID and PIN.

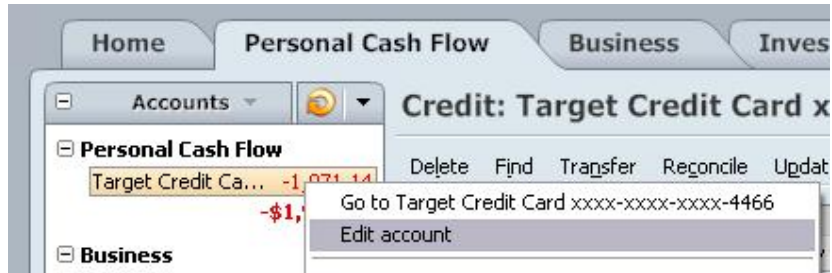
It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online banking service may stop functioning properly. This conversion should take 15–30 minutes.

BACK UP YOUR CURRENT DATA

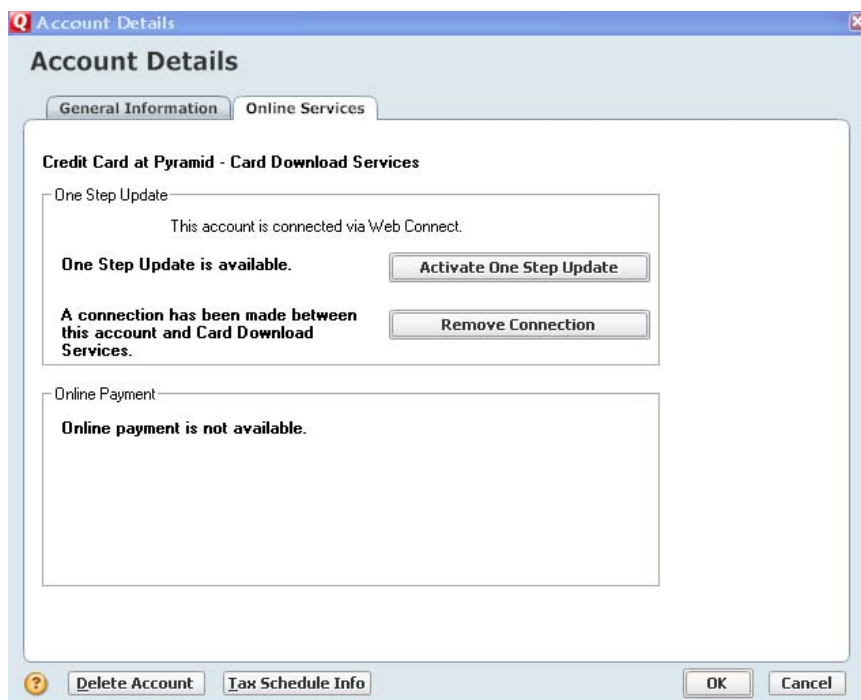
1. Choose File menu → Backup.
2. Specify which file to back up and where you want the backup saved in the Quicken Backup dialog, and then click OK.

DEACTIVATE YOUR ACCOUNT FROM WEB CONNECT

1. Right click the account in the Quicken Account List
2. Select Edit Account from pop-up.



3. Click the Online Services tab → click the Remove Connection button



4. Quicken will prompt you to confirm deactivation → click Yes → click ok

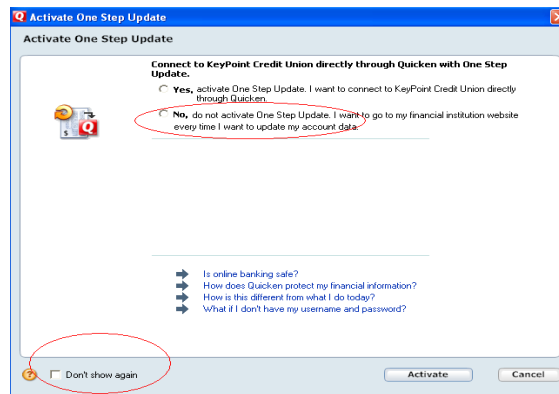
ACTIVATE WEB CONNECT



1. Login to your FI website from an external browser to initiate a download of a Web Connect file into Quicken (.QFX). When presented with the screen below, choose the "Use an existing Quicken account" radio button



NOTE: Now the account will be connected via Web Connect. Quicken may prompt to activate One Step Update after a successful Web Connect download. Please select No do not activate and check the box to not be prompted again. Screen shot on the next page.



Thank you for making these important changes!