

Quicken® Personal Finance Software 2007-2010 for Windows® Account Post-Conversion Instructions for Web Connect

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 to be able to log in to the Web site.

THESE STEPS ASSUME YOU HAVE ALREADY DOWNLOADED THE .QFX FILE FROM YOUR INSTITUTIONS OLD ONLINE BANKING WEBSITE.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online service may stop functioning properly. This conversion should take 10 minutes.

Note: In the following screen shots, red icon numbers match step number instructions. All financial institution and register information is fictitious and for illustration only.

A.

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.

B.

DOWNLOAD THE LATEST QUICKEN UPDATE

1. Choose Online menu → One Step Update.
2. In the One Step Update Settings dialog, uncheck any boxes that are checked, and then click Update Now.
3. If a software update is available, then you will be prompted to apply it now.
4. Once the update is complete, restart Quicken.

C.

GET YOUR LATEST TRANSACTIONS



1. If you haven't already imported your .qfx file that was downloaded from the old website do the following:
2. Go to File → File Import and select Web Connect File. Locate the .qfx file that you downloaded from the old website and select "open".

Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

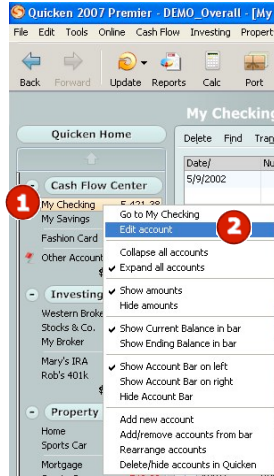
3. After importing all transactions move on to Step D.

D.

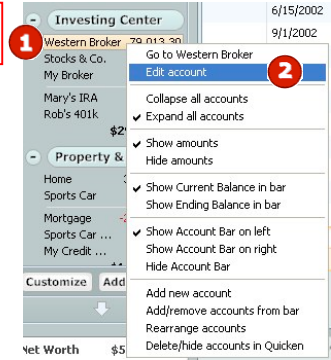
DEACTIVATE YOUR ACCOUNTS FROM WEB CONNECT

1. Right-click your first applicable account from the list.
2. Select Edit account from the pop-up menu. **Update Account Number and Routing Number as needed.**

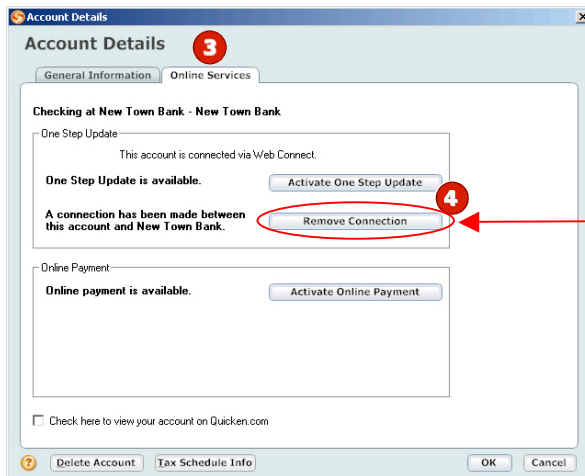
Banking Customers



Investing Customers



3. In the Account Details dialog, click the Online Services tab.



This button varies:

- If you manually download transactions, this button displays as **Remove Connection**.
- If you use One Step Update to automate downloading your transactions, this button displays as **Remove from One Step Update**.

4. Click Remove Connection or Remove from One Step Update in the One Step Update area. Confirm the remaining prompts.
5. Click the General Information tab. If applicable, edit the Account Name field to reflect new financial institution.
6. Click OK to close the Account Details dialog.

Repeat steps 1 through 6 for each account from which you download transactions.

E.

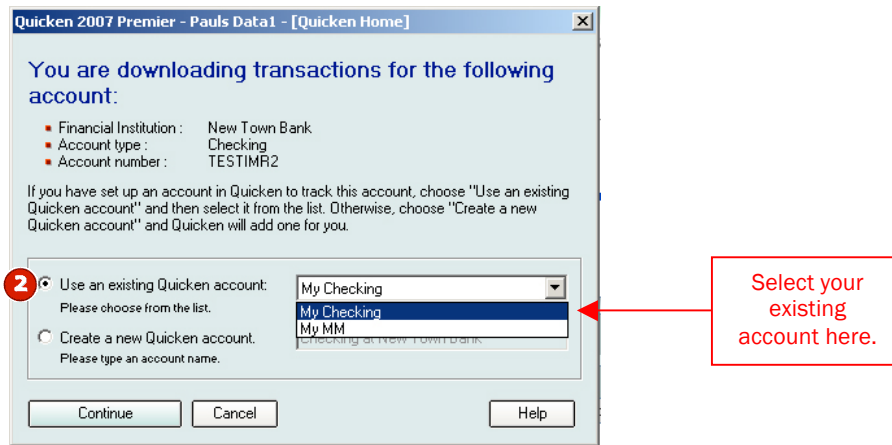
RE-ACTIVATE YOUR ACCOUNTS FOR WEB CONNECT

1. Open a Web browser and log in to your financial institution's Web site. Download your transactions into Quicken.



Important: To avoid the possibility of creating duplicate records when downloading into Quicken, select a "from" date that does not include records previously downloaded.

2. Click the Use an existing Quicken account radio button. In the corresponding drop-down list, select the Quicken account.



3. If prompted, enable the online connection or choose to activate "One Step Update".

Repeat steps 1 and 2 for each account that you will use for online banking or investing.

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!