

# Online Banking Web Connect Conversion Quicken Windows 2009



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, PIN/Password and security questions.

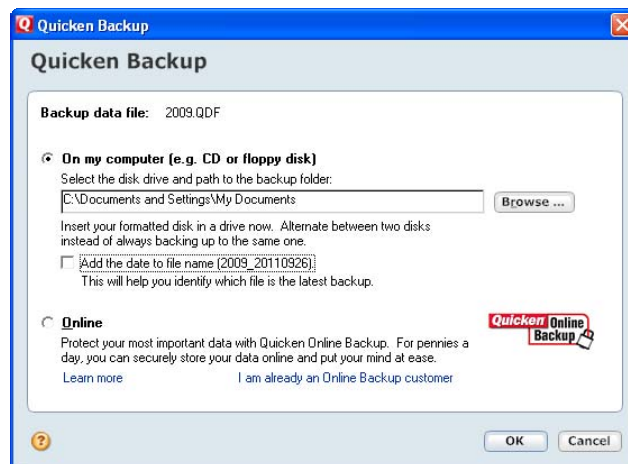
It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online banking service may stop functioning properly. This conversion should take 15–20 minutes.



This update is time sensitive and can be completed on or after October 26, 2011.

## 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.



## Download the Latest Quicken Update

1. Click on the Online menu → select One Step Update (Click Cancel if presented with Password Vault dialog box).
2. Uncheck all boxes → click Update Now in the One Step Update Settings dialog box.
3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.
4. When the update is completed, close and reopen Quicken.

## Get Your Latest Transactions

1. Log into your financial institution's web site → Download your transactions into Quicken.
2. Once the transactions are downloaded, accept all the transactions into your Quicken account register.
3. Repeat steps 1 and 2 for each account that you use for online banking or investing.



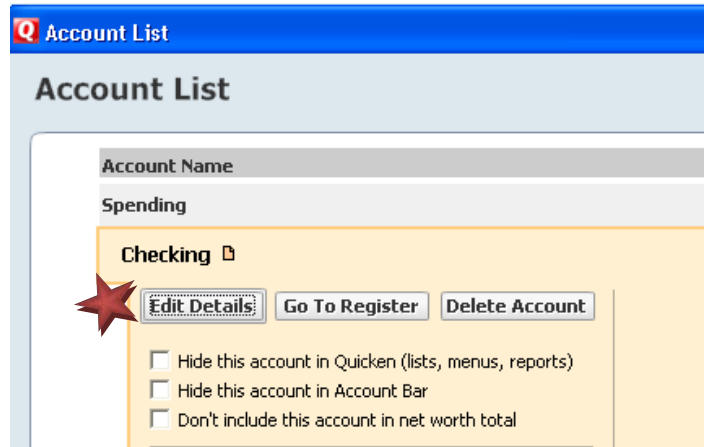
**Note:** You may not be able to download these transactions after the conversion.



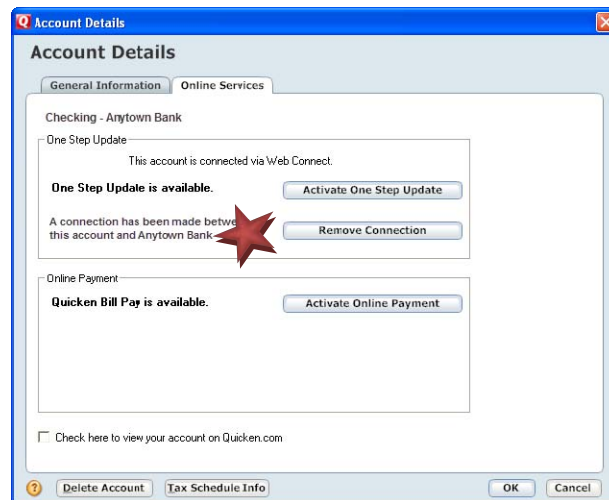
**Important:** You will not be able to proceed to the next section until you accept all transactions in the Downloaded Transactions tab.

# Deactivate Web Connect

1. Click on the Tools menu → select Account List. Highlight the account you want to deactivate → click on the Edit Details button.

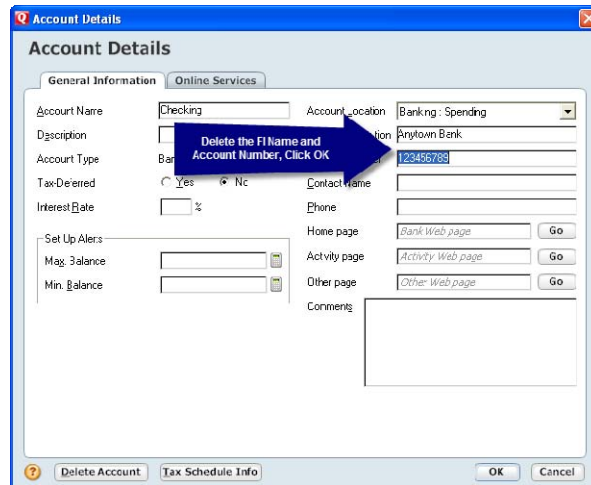


2. Click the Online Services tab → click the Remove Connection button.



3. Quicken will prompt you to confirm deactivation → click Yes → click OK

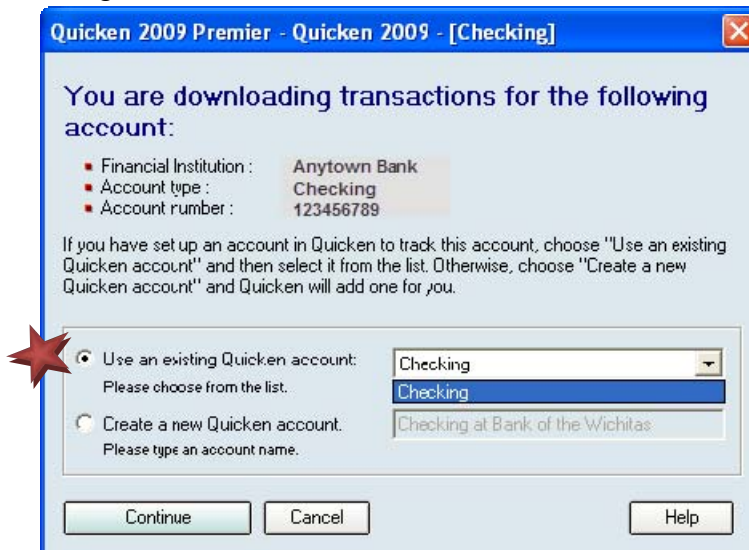
4. Select the General Information tab and remove the Financial Institution Name and Account Number as shown below → click OK to save changes.



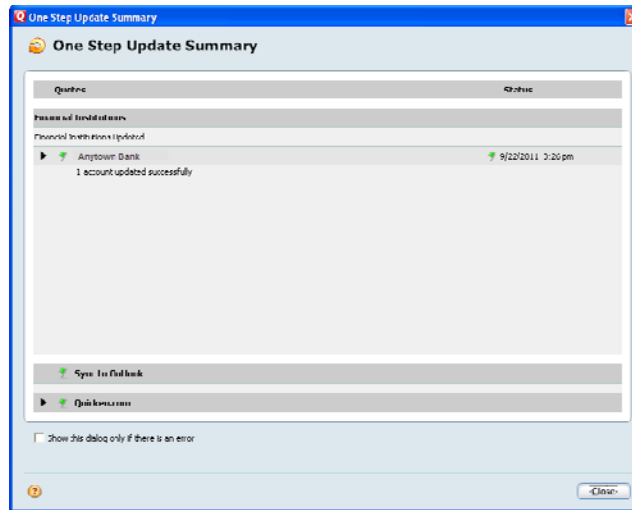
5. Repeat this step for each account you need to deactivate from online banking.

## Activate Web Connect

1. Log into 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



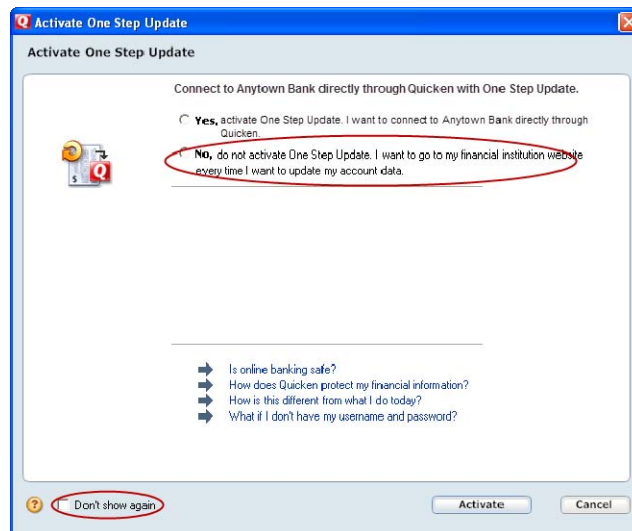
2. The One Step Update Summary screen will appear, confirming the account updated successfully.



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



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.



**Congratulations, you have completed the necessary changes!**



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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/Password, PIN and security questions.

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## Back Up Your Current Data

1. Choose File menu → Backup and Restore → Back up Quicken file.
2. Specify where to back up your Quicken file, and then click on Back up Now.



## Download the Latest Quicken Update

1. Click on the Tools menu and select One Step Update (Click Cancel if presented with Password Vault dialog).
2. Uncheck all boxes → Update Now in the One Step Update Settings dialog.
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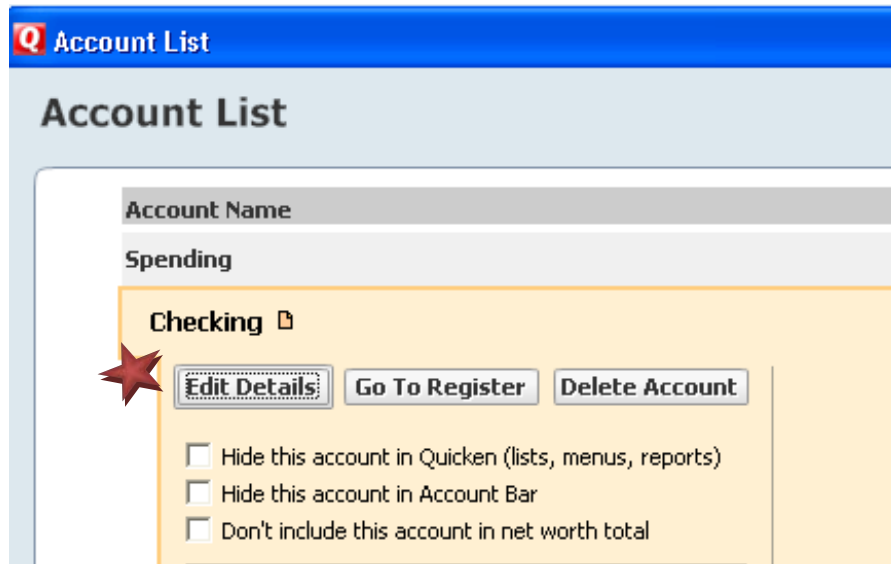
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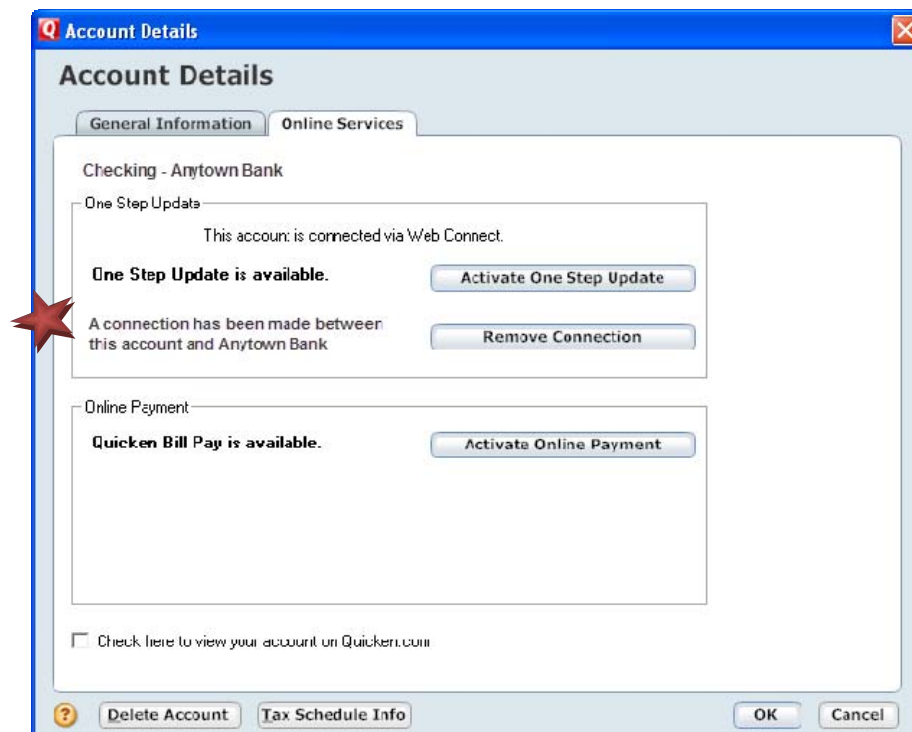
**Important:** You will not be able to proceed to the next section until you accept all transactions in the Downloaded Transactions tab.

# Deactivate Web Connect

1. Click on the Tools menu → select Account List. Highlight the account you want to deactivate → click on the Edit Details button.



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



3. Quicken will prompt you to confirm deactivation → click Yes → click OK.
4. Select the General tab and remove the Financial Institution Name and Account Number as shown below. Click OK to save changes.

**Account Details**

General Information | Online Services

Account Name: Checking | Account Location: Banking : Spending

Description: [ ] | Financial Institution: Anytown Bank

Account Type: Bar [ ] | Account Number: 123456789

Tax-Deferred:  Yes  No | Contact Name: [ ]

Interest Rate: [ ] % | Phone: [ ]

Home page: Bank Web page [Go]

Activity page: Activity Web page [Go]

Other page: Other Web page [Go]

Comments: [ ]

Buttons: Delete Account, Tax Schedule Info, OK, Cancel

## Change Download Preferences

1. Click on the Edit menu → click on Preferences → Quicken Services
2. Select Downloaded Transactions in left column
3. Remove check from “Automatic Transaction Entry”, if applicable
4. Click OK

**Preferences**

Select preference type:

- Startup
- Navigation
- Alerts
- Register
- Data entry and QuickFill
- Notify
- Write Checks
- Downloaded transactions
- Transfer Detection
- Reports and Graphs
- Reports only

Select preferences:

**Downloaded transactions preferences**

**Automatic Transaction Entry**

Automatically add downloaded transactions to registers

If you do not use this option, all downloaded transactions must be manually reviewed and accepted before they are added to your register. Unaccepted transactions will not display in reports, graphs and other product features.

**Renaming Rules**

Apply renaming rules to downloaded transactions

Automatically create rules when manually renaming

[Renaming Rules...]

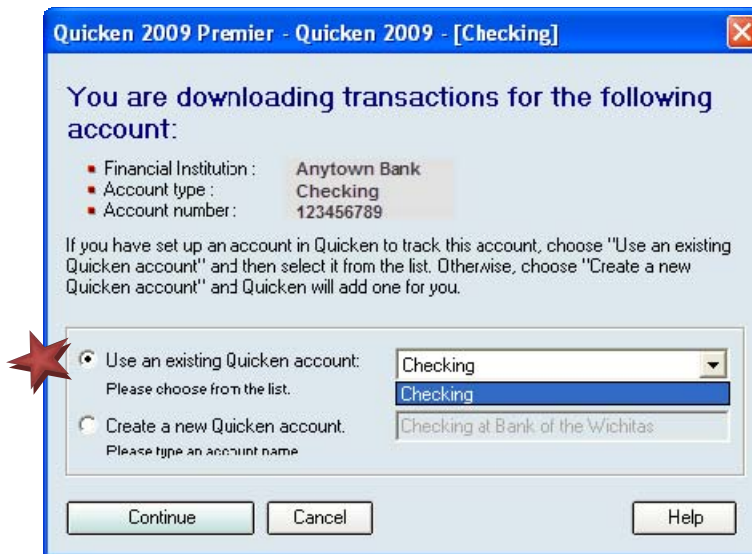
Capitalize first letter only in downloaded payee names

Hide accepted transactions in the list

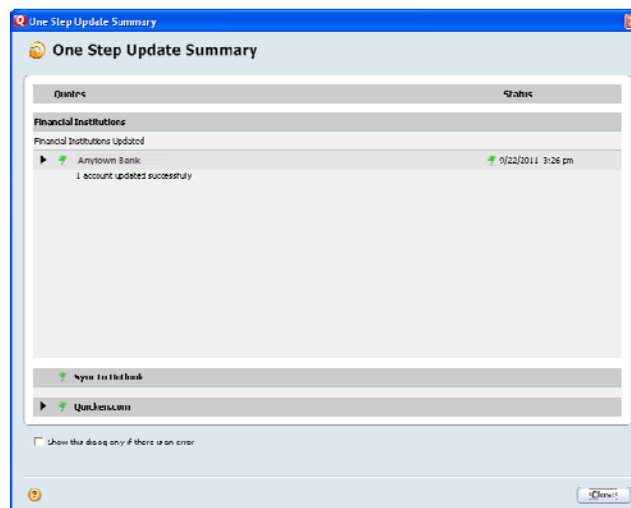
Buttons: OK, Cancel

# Activate Web Connect

1. Log into your financial institution's 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, and then click Continue.

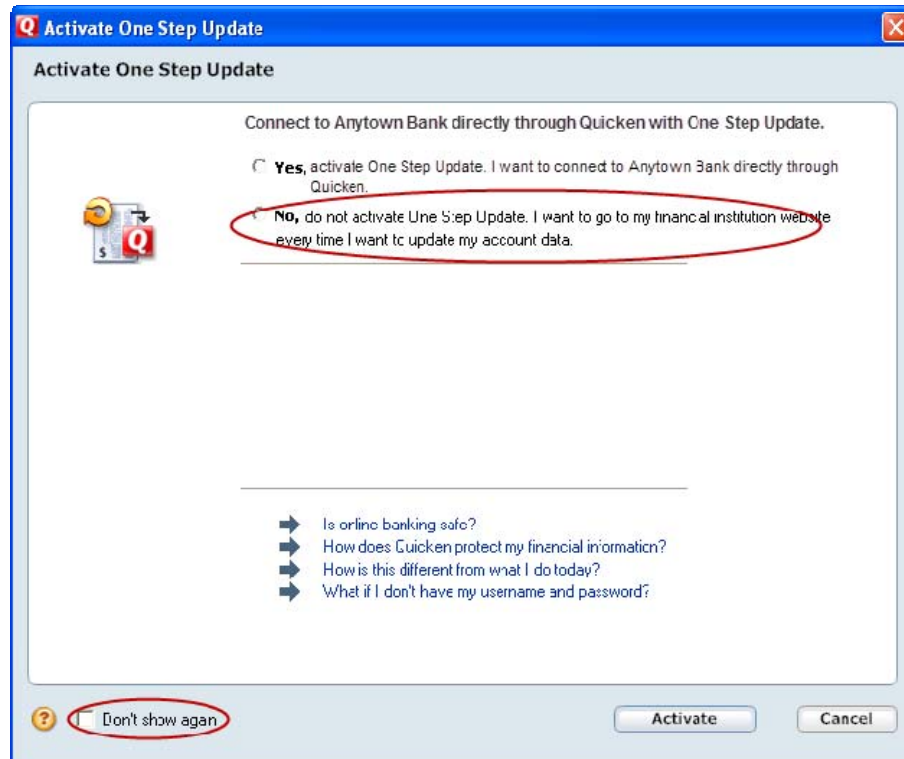


2. The One Step Update Summary screen will appear, confirming the account updated successfully.
3. Complete steps 1 and 2 to reactivate each account for online banking.





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.



**Congratulations, you have completed the necessary changes!**

# Online Banking Web Connect Conversion Quicken Windows 2011



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/Password, PIN and security questions.

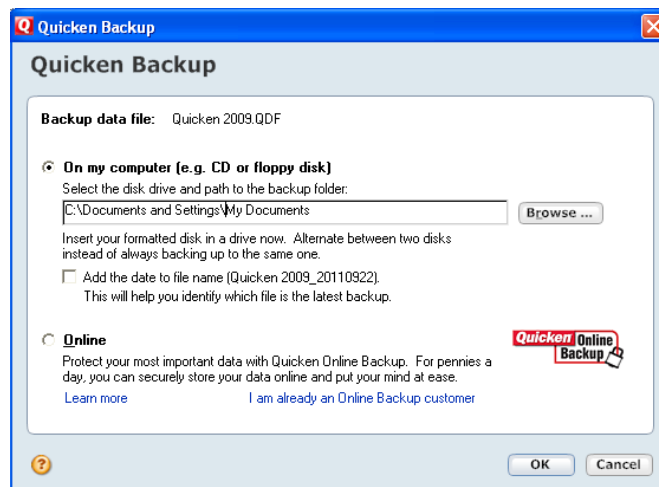
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## Back Up Your Current Data

1. Choose File menu → Backup and Restore → Back up Quicken file.
2. Specify where to back up your Quicken file → click Back up Now.



## Download the Latest Quicken Update

1. Click on the Tools menu and select One Step Update (If the Password Vault prompt appears, click Cancel).
2. Uncheck all boxes → Update Now in the One Step Update Settings dialog.
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4. When the update is completed, close and reopen Quicken.

## Get Your Latest Transactions

1. Log into your financial institution's web site. Download your transactions into Quicken.
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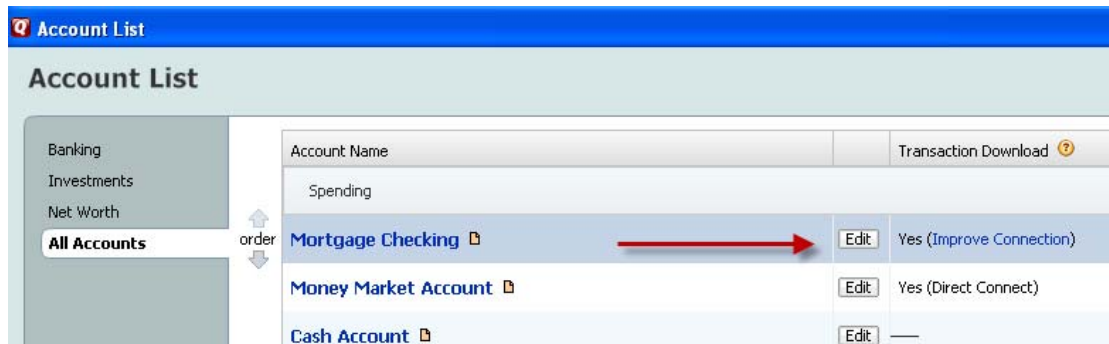
Note: You may not be able to download these transactions after the conversion.



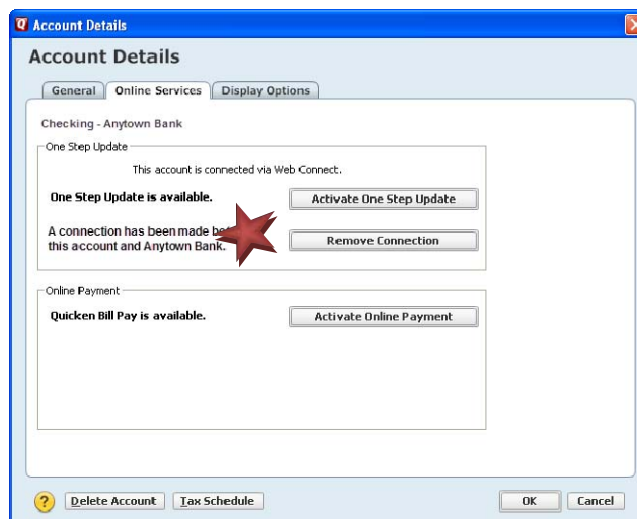
**Important:** You will not be able to proceed to the next section until you accept all transactions in the Downloaded Transactions tab.

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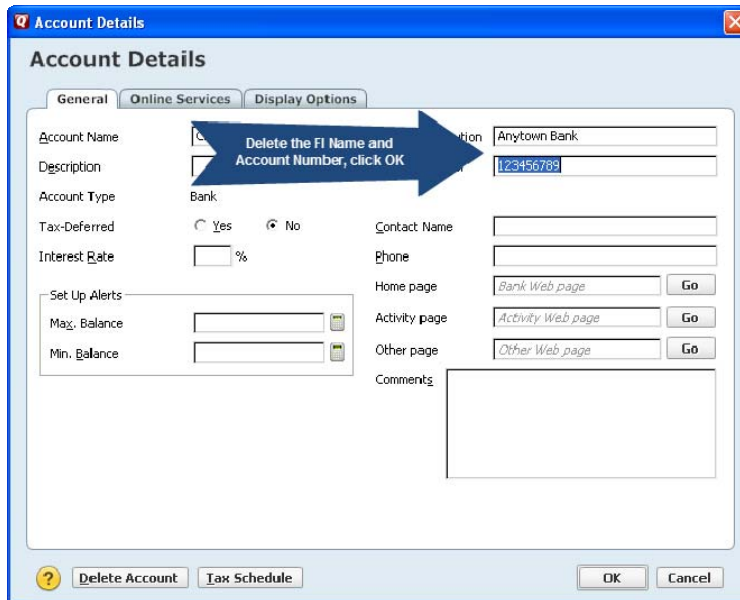
1. Click on the Tools menu → select Account List. Highlight the account you want to deactivate → click on the Edit button.



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

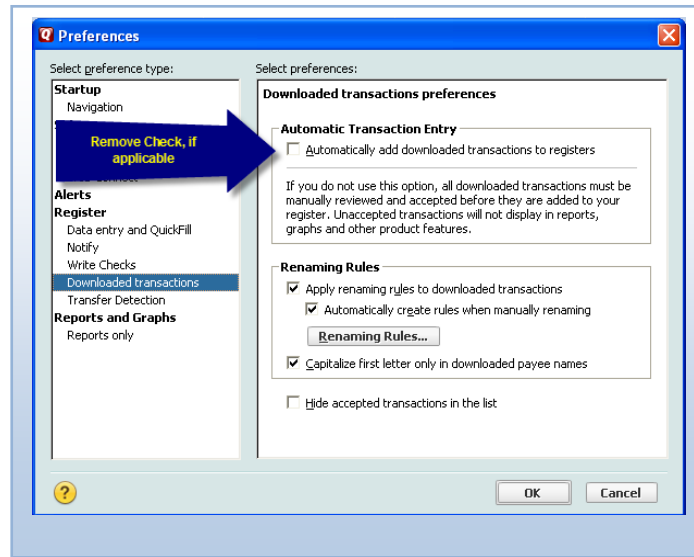


3. Quicken will prompt you to confirm deactivation → click Yes.
4. Select the General tab and remove the Financial Institution Name and Account Number as shown below → click OK to save changes.



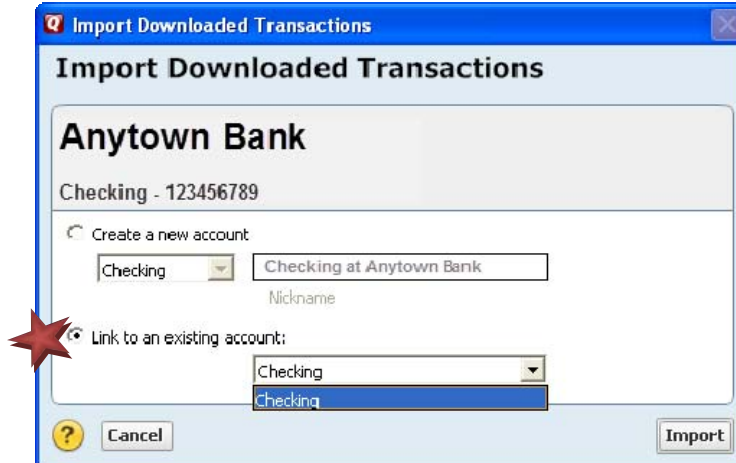
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3. Remove check from “Automatic Transaction Entry”, if applicable
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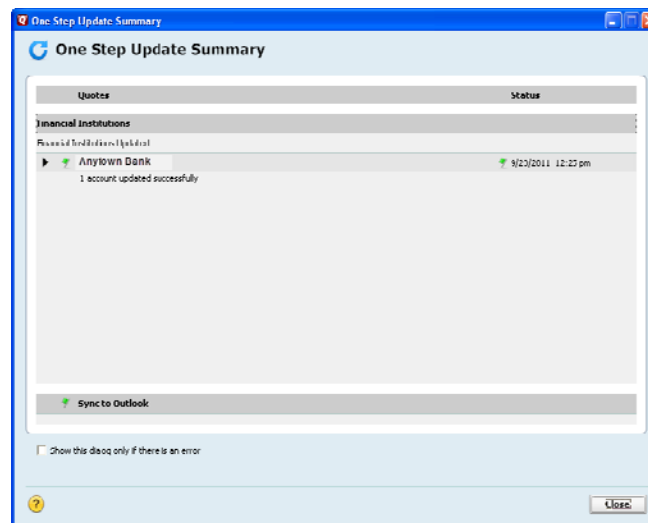


# Activate Web Connect

1. Log into your financial institution's 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 "Link to an existing account" radio button and select the appropriate account from the menu. Click Import.

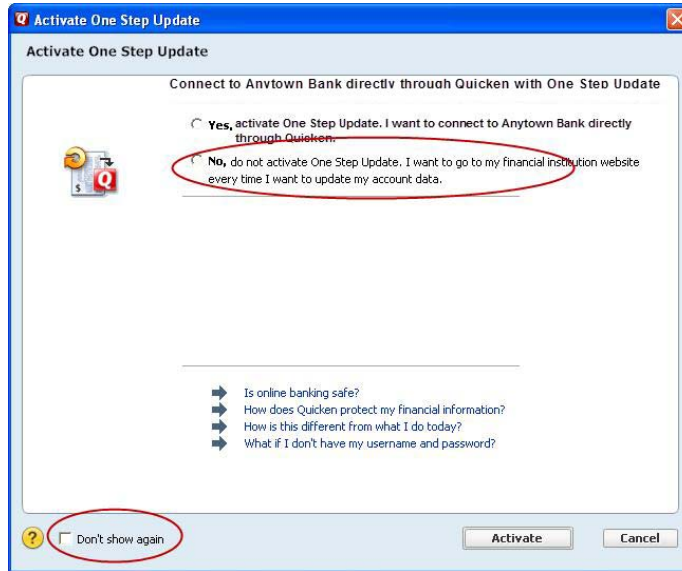


2. The One Step Update Summary screen will appear, confirming the account updated successfully.
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# Online Banking Web Connect Conversion Quicken Windows 2012



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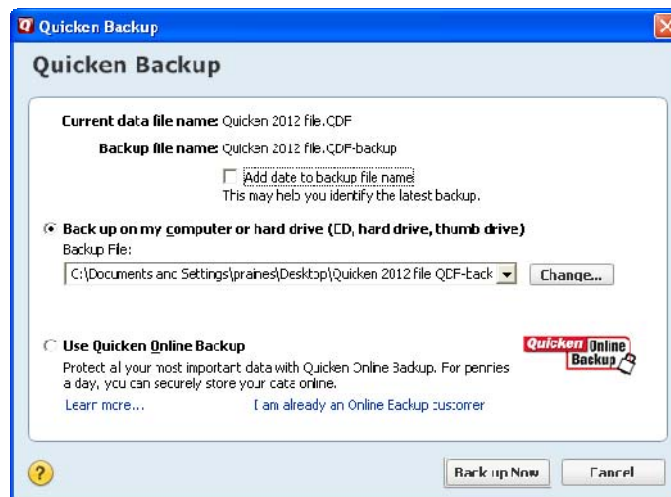
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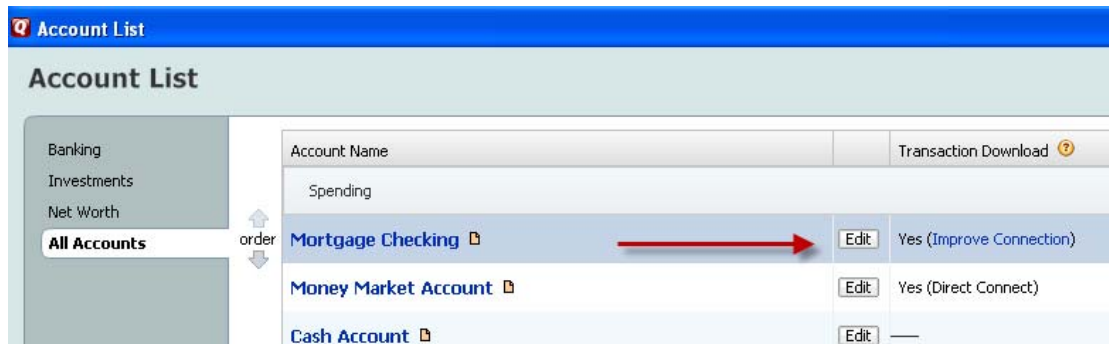
Note: You may not be able to download these transactions after the conversion.



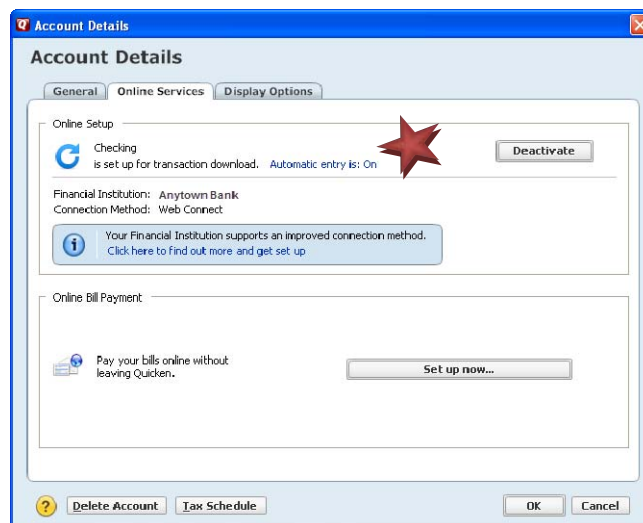
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# Deactivate Web Connect

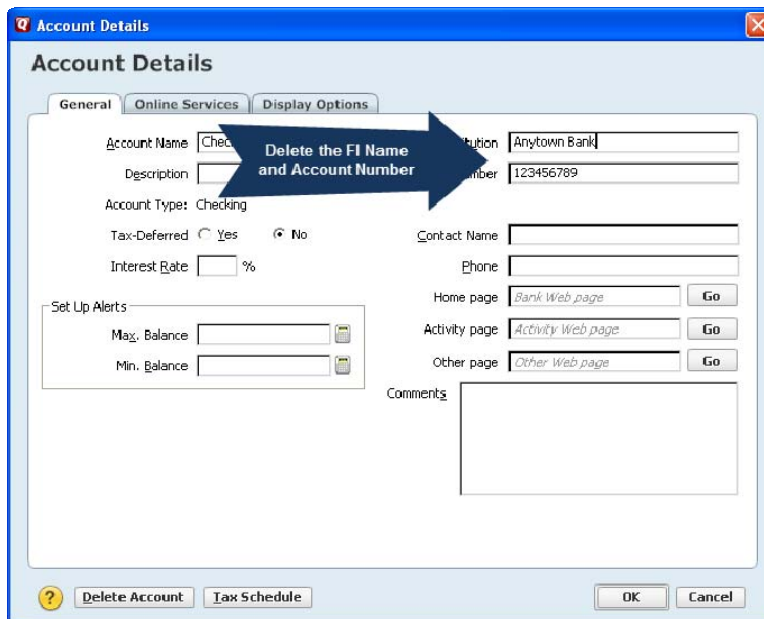
1. Click on the Tools menu → select Account List. Highlight the account you want to deactivate → click on the Edit button.



2. Click the Online Services tab → click Deactivate.

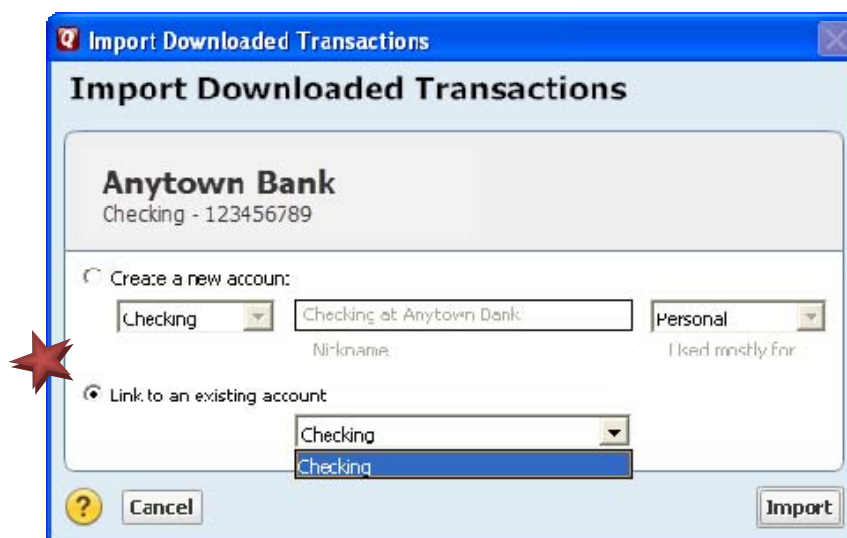


3. Quicken will prompt you to confirm deactivation → click Yes.
4. If Automatic entry is On, click on the link and select No - Never automatically add transactions for this account. Click OK.
5. Select the General tab and remove the Financial Institution Name and Account Number as shown below → click OK to save changes.

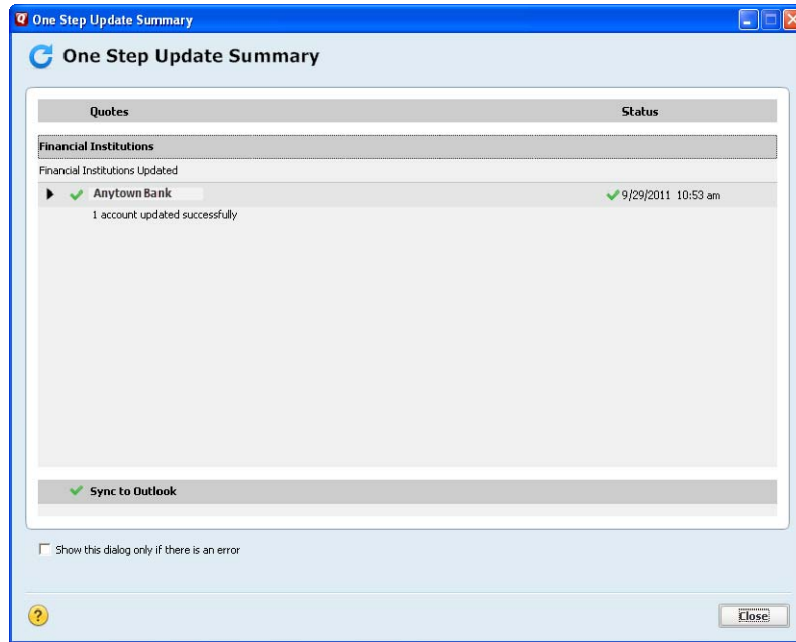


## Activate Web Connect

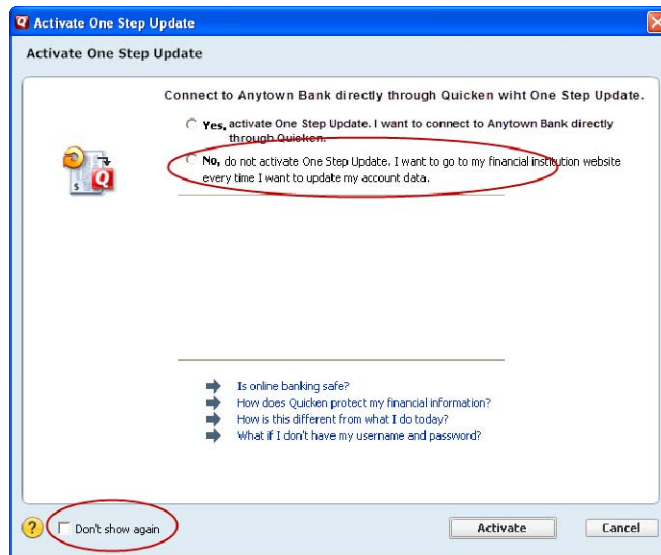
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