

Quicken® for Windows®

[Financial Institution] Account Conversion Instructions

As [Financial Institution] completes its system conversion Direct Connect, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your Access ID and passcode for [Financial Institution] and to be able to log in to the [Financial Institution] Web site.

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.

 Within this guide, this symbol displays to indicate that there are optional FAQs.

A.

BACK UP YOUR CURRENT DATA

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

B.

UPDATE THE FINANCIAL INSTITUTION LIST

Quicken 2010



1. Click the Update icon on the Quicken toolbar.
2. Uncheck all boxes → Update Now in the One Step Update Settings dialog.
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 Quicken. Reopen Quicken.

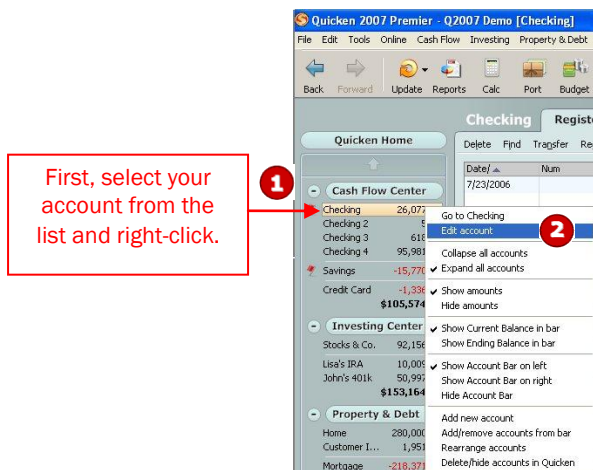
Quicken 2008-2009

1. Open Quicken > Go to Online > One Step Update.
2. Uncheck all boxes → Update Now in the One Step Update Settings dialog.

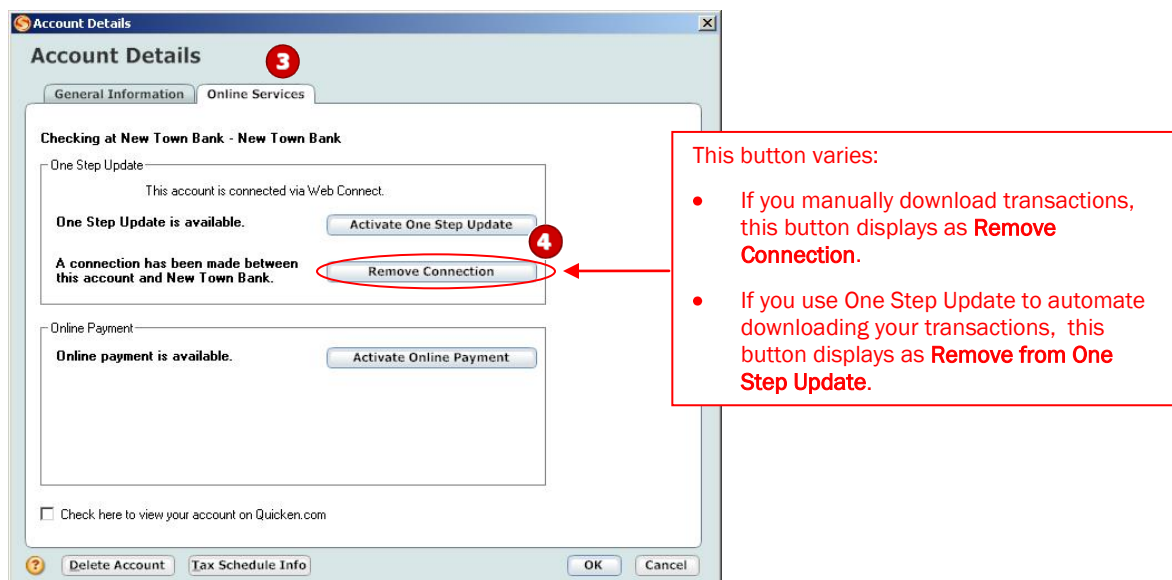
3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.
4. When the update is completed, close Quicken. Reopen Quicken.

C. DEACTIVATE YOUR ACCOUNTS WITH [Financial Institution]

1. Right-click your first [Financial Institution] account in the Cash Flow Center.
2. Select **Edit account** from the pop-up menu.



3. Click the **Online Services** tab.



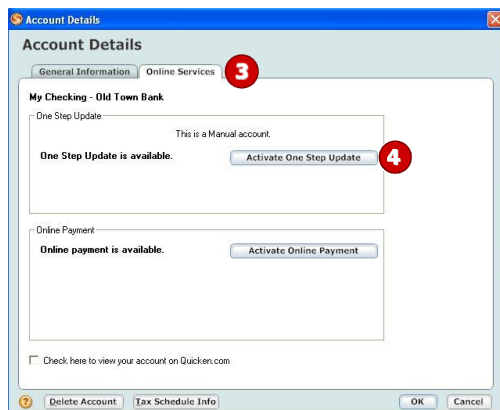
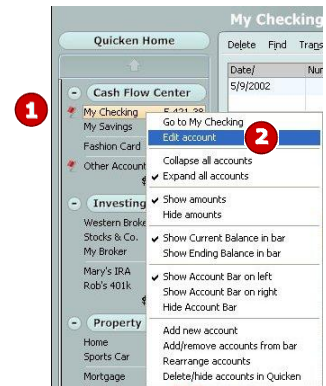
4. Click **Remove Connection** or **Remove from One Step Update** in the One Step Update area. Confirm the remaining prompts.

5. Click the **General Information** tab. In the **Financial Institution** field, type [\[Financial Institution\]](#).
Optionally, edit the **Account Name** field to reflect the new financial institution.
6. Click **OK** to close the Account Details dialog.

Repeat steps **1** through **6** for each [\[Financial Institution\]](#) account (such as checking, savings, credit cards, and brokerage). Verify that each account is deactivated by choosing **Tools** menu → **Account List**. As each online account is deactivated, the word **Activated** disappears for each account in the **Online Services** column.

D. ACTIVATE YOUR ACCOUNTS WITH [\[Financial Institution\]](#)

1. Right-click your first [\[Financial Institution\]](#) account in the **Cash Flow Center**.
2. Select **Edit account** from the pop-up menu.
3. Click the **Online Services** tab.



4. Click **Activate One Step Update** in the One Step Update area. Confirm the remaining prompts.
5. If you have more than one account, then match each Quicken account to the appropriate [\[Financial Institution\]](#) account in the drop-down list, and complete the remaining prompts.

If you have more than six accounts, then repeat steps **1** through **5** for each additional set of six accounts that you use with online services.

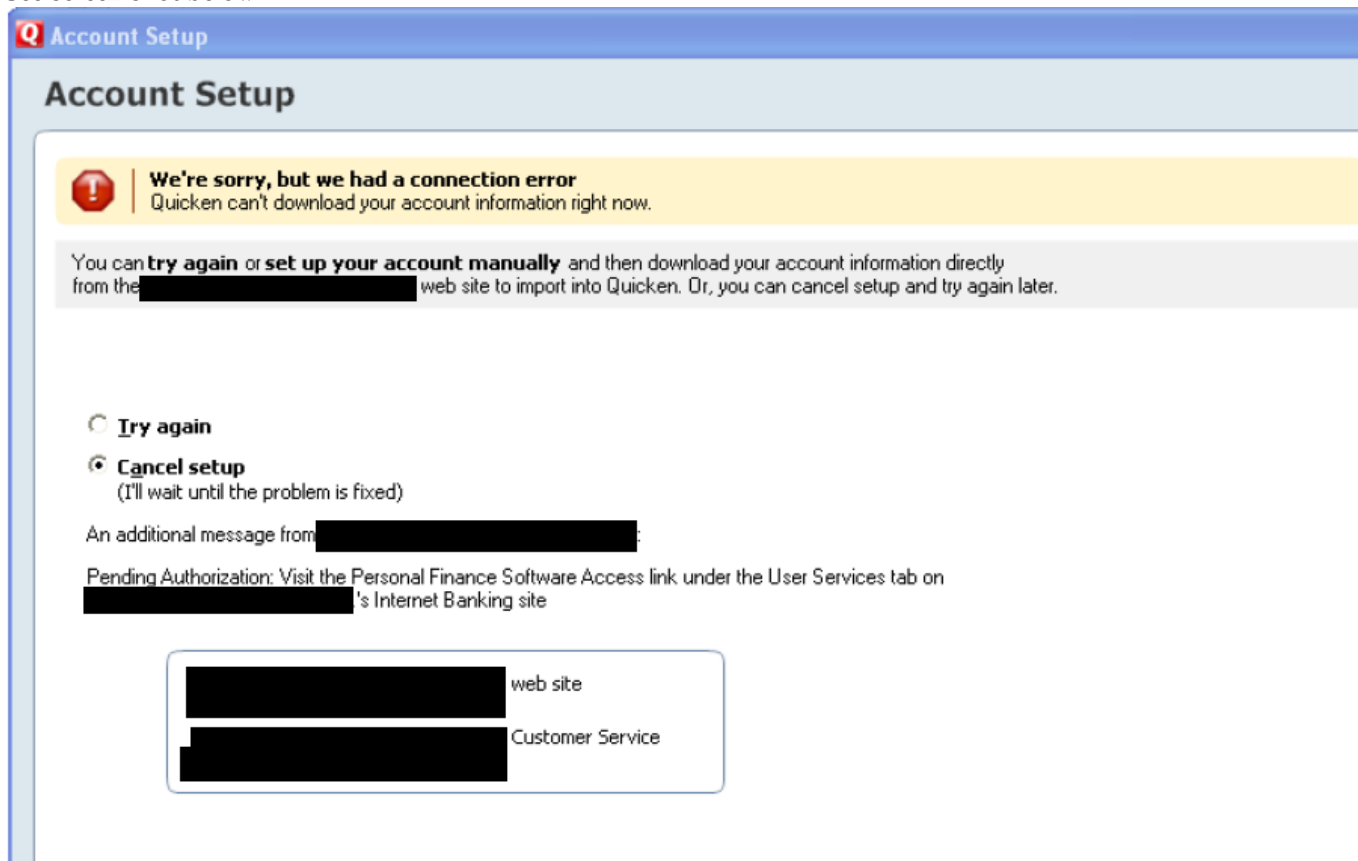
IMPORTANT! ACTIVATE YOUR QUICKEN FOR DIRECT CONNECT WITH [\[FINANCIAL INSTITUTION\]](#)

First time you attempt to Activate your first Account at [\[Financial Institution\]](#), you will receive an error:
“We’re sorry, but we had a connection error”

If you read below in the “An additional message from [\[Financial Institution\]](#)

“Pending Authorization: Visit the Personal Finance Software Access link under the User Services tab on [\[Financial Institution\]](#)’s Internet Banking site.”

See screen shot below:



Follow these steps to Activate Direct Connect for [Financial Institution]

1. Login to Internet Banking
2. Click the User Services tab
3. Click on the 'Personal Finance Software Access'
4. Click 'Enable' link against the Quicken request.
5. Return back to Quicken and check the radio button 'Try again' (the refresh). Then click 'Next'