

Quicken® Personal Finance Software 2007-2009 for Windows®

Account Conversion Instructions

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 and to be able to log in to the Web site. **This update may be time sensitive.**

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 15–30 minutes.

To see how your downloading experience will change after your account conversion, click [here](#).

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.



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

A.

BACK UP YOUR CURRENT DATA (ALL customers)

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** dialog, click **Update Now**.
3. If a software update is available, then you will be prompted to apply it now. If there is no update, continue to section C.
4. Once the update is complete, restart Quicken.

C.

DETERMINE WHICH DOWNLOAD METHOD YOU ARE USING (ALL customers)

1. Right click the account in the Quicken Account List.
2. Select **Edit Account** from the pop-up.
3. Click the **Online Services** tab. In the One Step Update section, it will state the connection method that you are using:
 - This account is connected via Web Connect.
 - This account is connected via Direct Connect.
4. If the account is connected via **Web Connect**, go to step **E**.
5. If the account is connected via **Direct Connect**, continue to section **D**.

D.

GET YOUR LATEST TRANSACTIONS (Direct Connect Users)

1. Choose **Online** menu → **One Step Update**.
2. In the Online Update for this account dialog, make sure all items are checked. Enter your password, and then click **Update Now**.
3. If new transactions display in the Online Update Summary window, then accept them in your Quicken account register.
 - ▲ For help accepting transactions, choose **Help** menu → **Quicken Help**. In the Type in the word(s) to search for: prompt, enter **Accept downloaded transactions into my transaction list**.
 - ▲ For assistance reconciling your account register, choose **Help** menu → **Quicken Help**. In the Type in the word(s) to search for: prompt, enter **Reconciling an account**.
4. Go to section **F** to complete the deactivation process.

E.

GET YOUR LATEST TRANSACTIONS (Web Connect Users)

1. Log in to your financial institution's Web site, if available. Download your transactions into Quicken.

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

Repeat this step for each account (such as checking, savings, loans, etc.) that you use for online banking.

2. Once the transactions are downloaded, **accept all the transactions into your Quicken account register.**

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

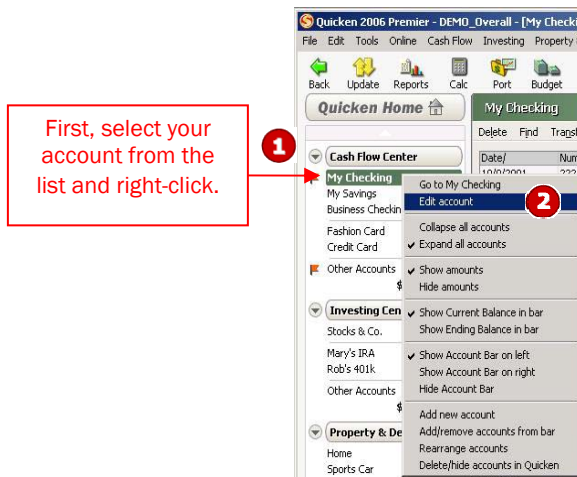
▲ For help accepting transactions, choose **Help** menu → **Quicken Help**. In the Type in the word(s) to search for: prompt, enter **Accept downloaded transactions**.

▲ For assistance reconciling your account register, choose **Help** menu → **Quicken Help**. In the Type in the word(s) to search for: prompt, enter **Reconciling an account**.

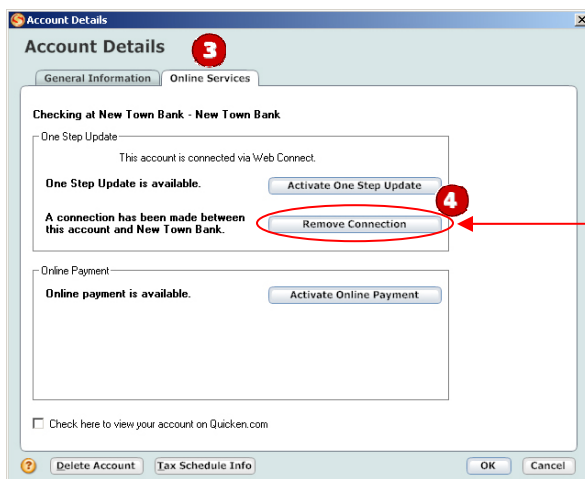
3. Go to section **F** to complete the deactivation process.

DEACTIVATE YOUR ACCOUNTS (ALL customers)

1. Right-click your account from the list of accounts under Cash Flow Center.
2. Select **Edit account** from the drop-down list.



3. Click the **Online Services** tab.
4. Click **Remove from One Step Update**. Confirm the remaining prompts.



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**.

Repeat steps **1** through **5** for each account (such as checking, savings, loans, etc.). 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.

G.

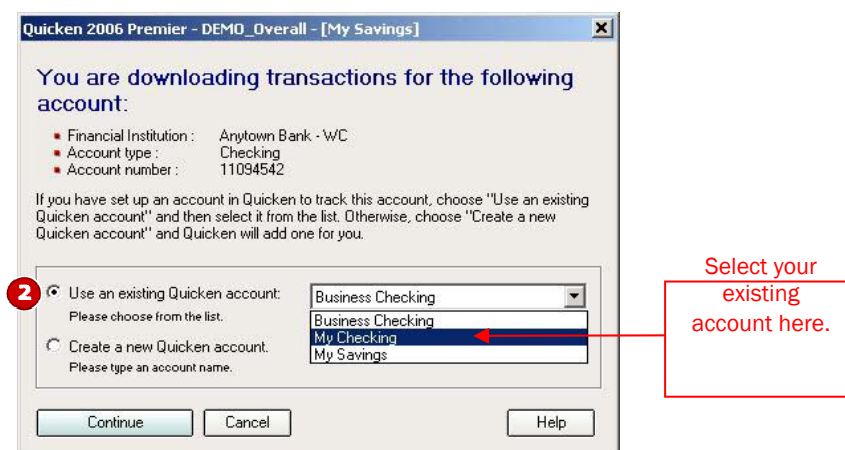
ACTIVATE YOUR ACCOUNTS (ALL customers)

IMPORTANT: Complete section **G** on or after the conversion date.

1. Anytime on or after the conversion, 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 applicable Quicken account.



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

NEW FUNCTIONALITY WITH YOUR QUICKEN 2007 WEB CONNECT ACCOUNT

As a result of this account conversion, you will download transactions by logging into your financial institution's Web site or through the Online Center in Quicken. Choose **Online** menu → **Online Center**. Select your financial institution from the drop-down list. Click **Update/Send**. Log in to your financial institution's Web site, and then download your transactions into Quicken.

Also due to this system conversion, online bill payment within Quicken is no longer available. Contact your financial institution to sign up for Web-based bill payment.

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!