

Quicken® Personal Finance Software 2007-2010 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 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.



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**.

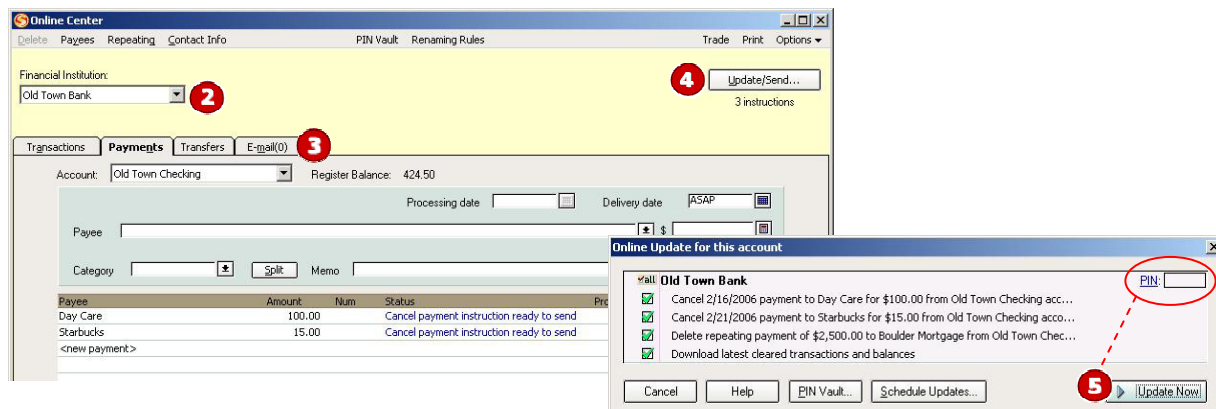
B.

DOWNLOAD THE LATEST QUICKEN UPDATE (ALL customers)

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.
4. Once the update is complete, restart Quicken.

GET YOUR LATEST TRANSACTIONS (ALL customers)

1. Choose **Online** menu → **Online Center**.

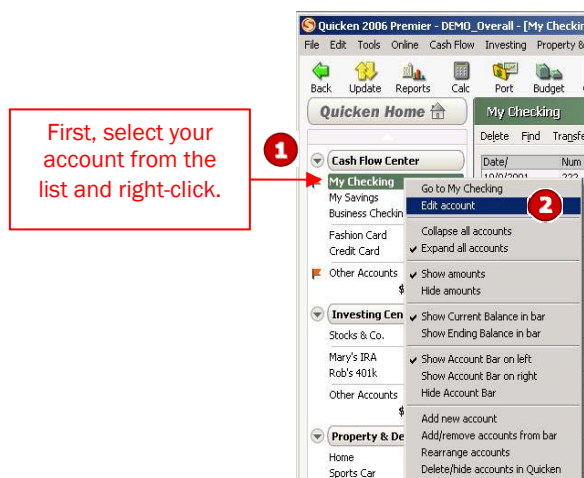


2. Select your financial institution from the **Financial Institution** drop-down list.
3. Click the **E-mail** tab and view any e-mails, if necessary.
4. Click **Update/Send....**
5. In the Online Update for this account dialog, make sure all items are checked. Enter your password, and then click **Update Now**.
6. 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**.

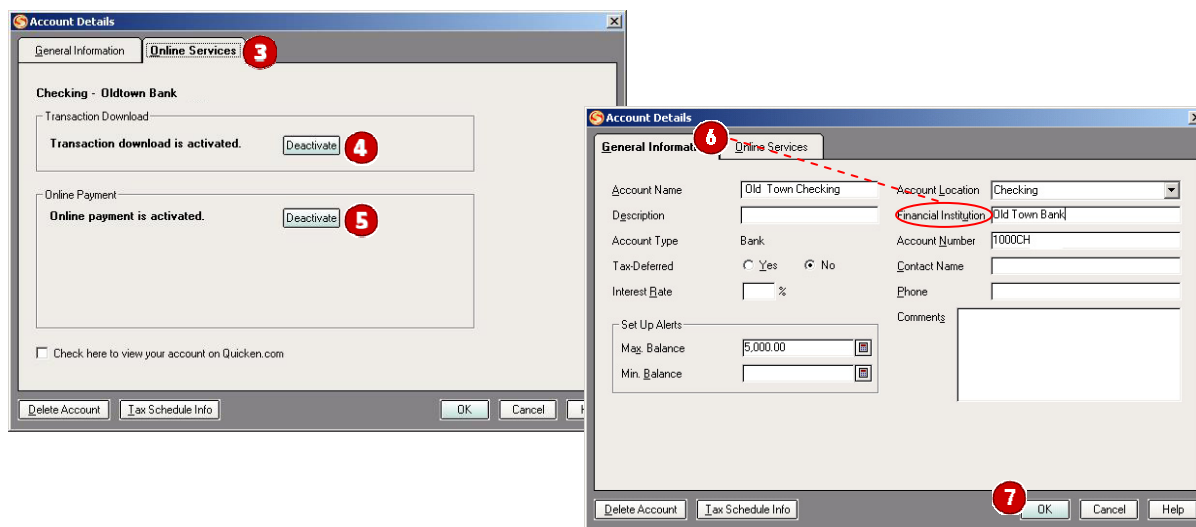
D.

DEACTIVATE YOUR ACCOUNTS FROM DIRECT CONNECT (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.

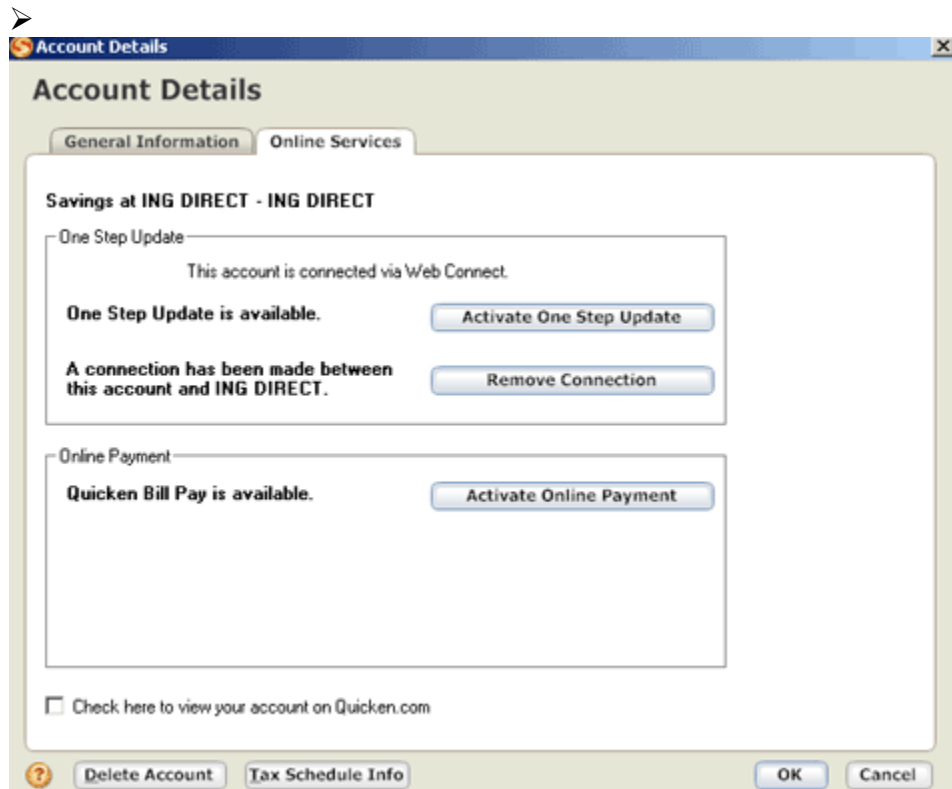


3. Click the **Online Services** tab.
4. Click **Deactivate** for Transaction Download. Confirm the remaining prompts.
5. Click **Deactivate** for Online Payment, if applicable. Confirm the remaining prompts.
6. Click the **General Information** tab. In the Financial Institution field, type your financial institution's name.
7. Click **OK** to close the Account Details dialog.

Repeat steps **1** through **7** for each 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.

Activating Express Web Connect:

- Click the "Activate One Step Update" button and follow the onscreen prompts to complete the One Step Update activation process. Now the account will be connected using Express Web Connect.



You will be prompted to provide your login credentials and a list of available accounts will be presented. Check any that you want to set up for Express Web Connect. Intuit will log in to the online banking system daily on your behalf and collect the transactions available. When you want to process them, simply click One Step Update and they will automatically download into your accounts for processing.

If you wish to cancel this process, you will need to Deactivate Express Web Connect, which will delete the login token from Intuit's servers.

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!