Quicken® Personal Finance Software 2007-2009 for Windows® Account Conversion Instructions for Web Connect to Direct 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 your customer ID and password 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 10 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.

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

A. DOWNLOAD THE LATEST QUICKEN UPDATE

1. Choose **Online** menu → **One Step Update**.

2. In the One Step Update Settings dialog, uncheck any boxes, and then click **Update Now**.

3. If a software update is available, then you will be prompted to apply it now.

4. When the update completes, restart Quicken.

B. ACCEPT YOUR TRANSACTIONS

1. **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**.
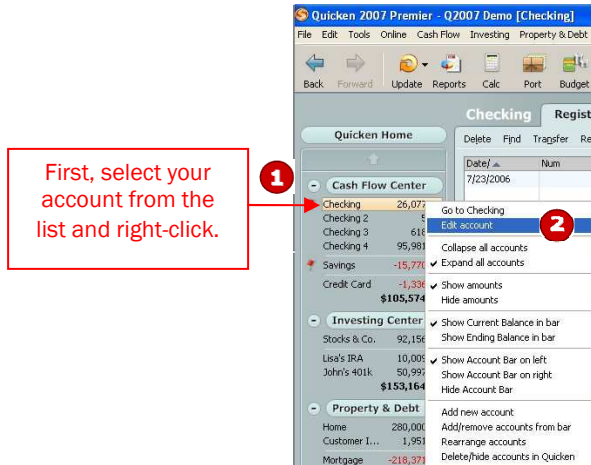
C.	BACK UP YOUR CURRENT DATA

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**.
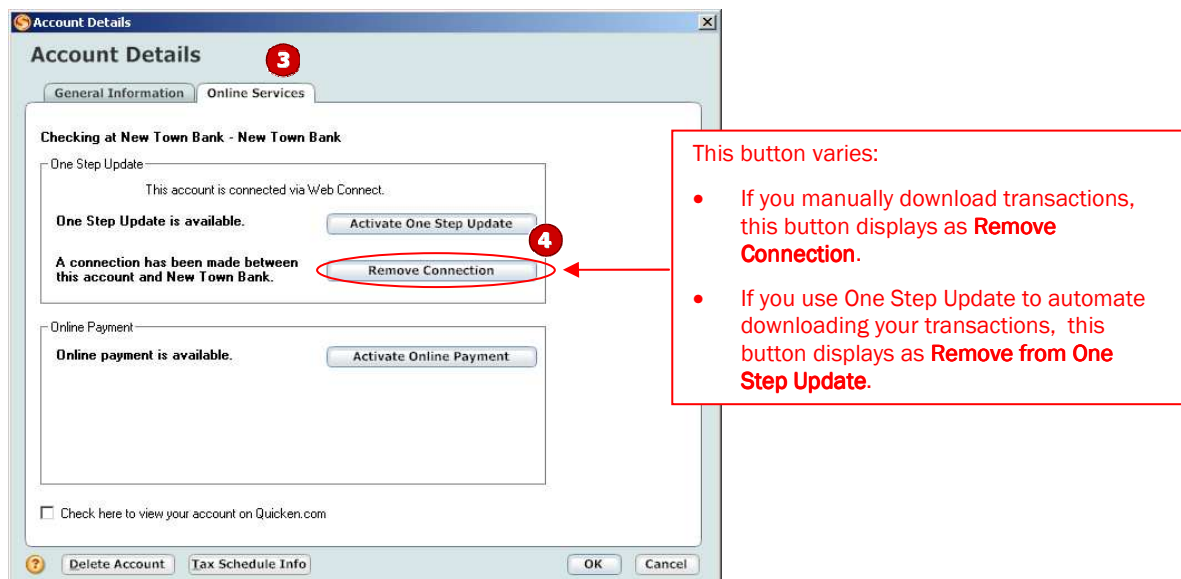
1. Right-click your first applicable account..

2. Select **Edit account** from the pop-up menu. **EDIT Account Number, RTN, etc. as needed.**

First, select your account from the list and right-click.

3. 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. In the Financial Institution field, type the financial institution name.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 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.

IMPORTANT: Complete section **E** *on or after* the conversion.

1. Right-click your first account.

2. Select **Edit account** from the pop-up menu. **Double click the financial institution box and select the correct FI Name.**

3. Click the **Online Services** tab.
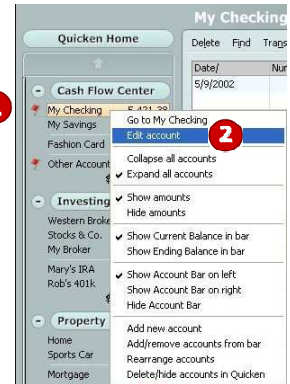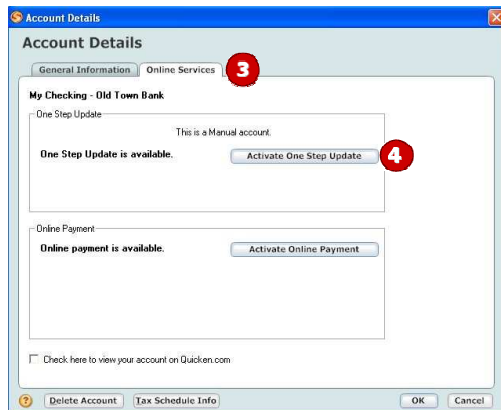
4. Click **Activate One Step Update** in the One Step Update area. Confirm the remaining prompts.

5. Follow the on-screen instructions, and enter the account information. If you have more than one account, then match each Quicken account to the appropriate 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.

NEW FUNCTIONALITY WITH YOUR QUICKEN DIRECT CONNECT ACCOUNT

As a result of this account conversion, you now have the convenience of downloading directly within Quicken. Now, each time you perform an account download, you'll do a One Step Update rather than a Web site download. Choose **Online** menu → **One Step Update**. Click to select the download options you want, enter your financial institution's password, and click **Update Now**.

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!