Quicken® Personal Finance Software 2008-2010 for Windows®
Account Conversion Instructions for Web 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 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.

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.

A. 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**.

B. DOWNLOAD THE LATEST QUICKEN UPDATE

1. Choose **Online** menu → **One Step Update**.
2. In the One Step Update Settings dialog, uncheck any boxes that are checked, and then 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.

C. GET YOUR LATEST TRANSACTIONS

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

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

Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

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.

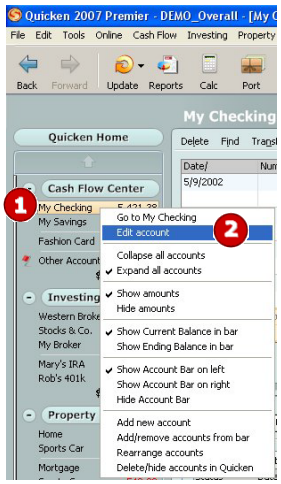
- For help accepting transactions, choose **Help** menu → **Quicken Help**. In the Type in the word(s) to search for: prompt, enter **Accept downloaded transactions**.
- For assistance reconciling your account register, choose **Help** menu → **Quicken Help**. In the Type in the word(s) to search for: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

D. DEACTIVATE YOUR ACCOUNTS FROM WEB CONNECT

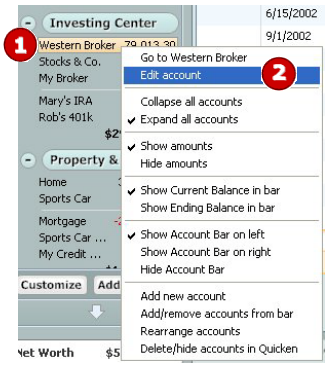
1. Right-click your first applicable account from the list.

2. Select **Edit account** from the pop-up menu. **Update Account Number and Routing Number as needed.**

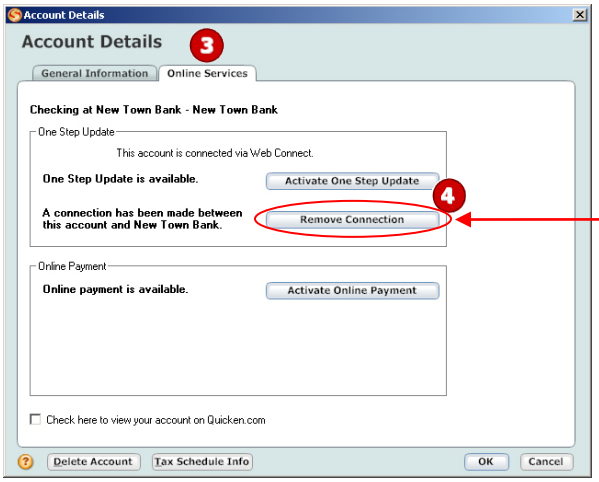
Banking Customers



Investing Customers



3. In the Account Details dialog, 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. If applicable, edit the Account Name field to reflect new financial institution.

6. Click **OK** to close the Account Details dialog.

Repeat steps **1** through **6** for each account from which you download transactions.

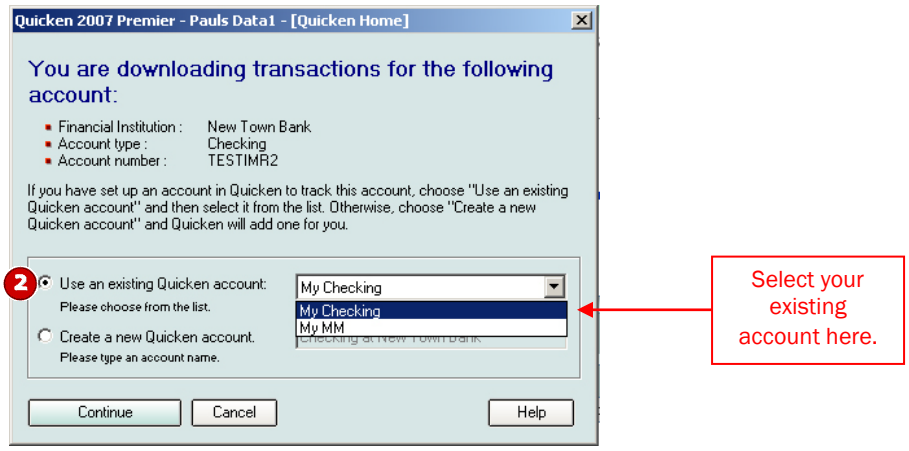
E. RE-ACTIVATE YOUR ACCOUNTS FOR WEB CONNECT

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

1. Open a Web browser and 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 Quicken account.



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

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!