

Quicken for Windows Conversion Instructions

Quicken for Windows 2012-2015

Express Web Connect to Web Connect

Table of Contents

TABLE OF CONTENTS **1**

INTRODUCTION..... **2**

DOCUMENTATION AND PROCEDURES..... **2**

 Task 1: Conversion Preparation.....2

 Task 2: Connect to First Madison Bank & Trust.....2

 Task 3: Deactivate Your Account(s) At First Madison Bank & Trust3

 Task 4: Re-activate Your Account(s) at [Financial Institution B]3

[Insert Your Logo Here]

Introduction

As **First Madison Bank & Trust** completes its system conversion. You will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your **[User ID and Password]** for the **First Madison Bank & Trust** website.

NOTE: For Quicken Web Connect/Express Web Connect accounts, use the same User ID and PIN/Password as your financial institution website. For Direct Connect, the login credentials may be different. Please contact your financial institution to verify your Direct Connect login information.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

NOTE: This update is time sensitive and can be completed on or after 02/24/2015.

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Quicken Help**. Search for **Backup Data File** and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Quicken Help**. Search for **Update Software** and follow the instructions.

Task 2: Connect to First Madison Bank & Trust

1. Choose **Tools** menu > **One Step Update**.
2. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.
3. In the **One Step Update Settings** dialog, make sure all items are checked and click **Update Now**.
4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

NOTE:

If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

Task 3: Deactivate Your Account(s) At First Madison Bank & Trust

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate** Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. Repeat steps 2–6 for each account at **First Madison Bank & Trust**.

Task 4: Re-activate Your Account(s) at First Madison Bank

1. Log in to **First Madison Bank** and download your Quicken Web Connect file.
2. Click **File > File Import > Web Connect File**.
3. If prompted for connectivity type, select **Web Connect**.

NOTE:

Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

4. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching account in the drop-down menu.

IMPORTANT:

Do **NOT** select **Create a new account**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.

5. Repeat steps 2 – 4 for all of your accounts.

Thank you for making these important changes!