

Online Banking Web Connect Conversion

Quicken Windows 2009-2011

[Insert Your Logo Here]

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.

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



This update is time sensitive and must be completed between [\[Beginning Date\]](#) and [\[End Date\]](#).

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.

DOWNLOAD THE LATEST QUICKEN UPDATE



1. Click the Update icon on the Quicken toolbar.
2. Uncheck all boxes → Update Now in the One Step Update Settings dialog.
3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.
4. When the update is completed, close Quicken. Reopen Quicken.

GET YOUR LATEST TRANSACTIONS



1. Log in to your financial institution's Web site, if available. Download your transactions into Quicken.
2. Once the transactions are downloaded, accept all the transactions into your Quicken account register.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.



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



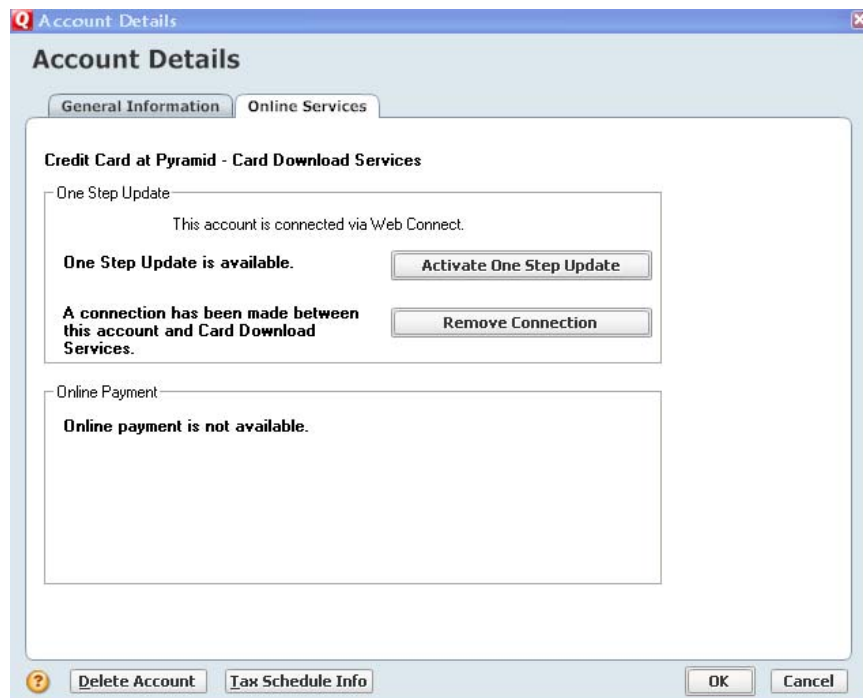
Important: You will not be able to proceed to the next section until you accept all transactions in the Downloaded Transactions tab.

DEACTIVATE YOUR ACCOUNT FROM WEB CONNECT

1. Right click the account in the Quicken Account List
2. Select Edit Account from pop-up.



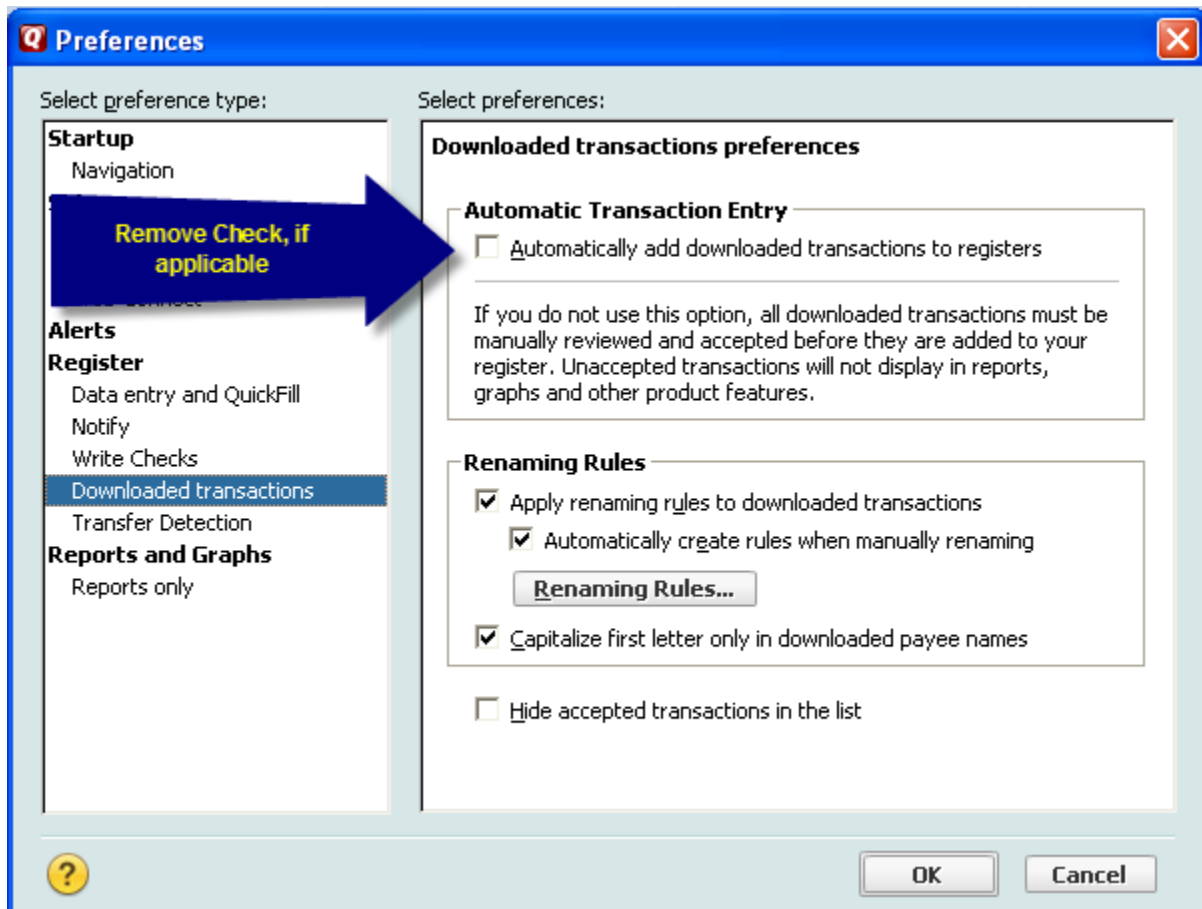
3. Click the Online Services tab → click the Remove Connection button



4. Quicken will prompt you to confirm deactivation → click Yes → click ok

CHANGE DOWNLOAD PREFERENCES

1. Click on the Edit menu → click on Preferences
2. Select Downloaded Transactions in left column
3. Remove check from “Automatic Transaction Entry”, if applicable
4. Click OK.



REMOVE FI NAME AND ACCOUNT NUMBER

1. Right click the account in the Quicken Account List
2. Select Edit Account from pop-up.
3. Under the General tab, remove the Financial Institution Name and Account Number as shown below. Click OK to save changes.

Account Details

Account Details

General Online Services Display Options

Account Name Financial Institution Name

Description 123456789

Account Type Bank

Tax-Deferred Yes No

Interest Rate %

Set Up Alerts

Max. Balance

Min. Balance

Contact Name

Phone

Home page

Activity page

Other page

Comments

ACTIVATE WEB CONNECT

Download to
Quicken

1. Login to your FI website from an external browser to initiate a download of a Web Connect file into Quicken (.QFX). When presented with the screen below, choose the "Use an existing Quicken account" radio button

You are downloading transactions for the following account:

- Financial Institution : Target National Bank
- Account type : Credit Card
- Account number :

If you have set up an account in Quicken to track this account, choose "Use an existing Quicken account" and then select it from the list. Otherwise, choose "Create a new Quicken account" and Quicken will add one for you.

Use an existing Quicken account: Target Credit Card xxxx-xxxx-xxxx-4466
Please choose from the list.

Create a new Quicken account: Credit Card at Target National Bank
Please type an account name.

Continue Cancel Help



NOTE: Now the account will be connected via Web Connect. Quicken may prompt to activate One Step Update after a successful Web Connect download. Please select No do not activate and check the box to not be prompted again. Screen shot on the next page.

Activate One Step Update

Connect to KeyPoint Credit Union directly through Quicken with One Step Update.

Yes, activate One Step Update. I want to connect to KeyPoint Credit Union directly through Quicken.

No, do not activate One Step Update. I want to go to my financial institution website every time I want to update my account data.

Is online banking safe?
How does Quicken protect my financial information?
How is this different from what I do today?
What if I don't have my username and password?

Don't show again

Activate Cancel

Thank you for making these important changes!