Quicken Conversion Instructions

As your financial institution completes its system conversion, you will need to modify your Quicken settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for both Windows and Mac, and the connectivity type Web Connect.

These instructions refer to two "Steps." The 1st Step and 2nd Stepin the instructions will be provided to you by your financial institution.

To navigate this document, just click the link or links below that match your product and connectivity:

Instructions for Downloading a Web Connect file from your Online Banking Site

Quicken Windows Web Connect

On the 1st Step:

1. Backup Quicken Windows Data File and Update.
   a. Choose **File > Backup and Restore > Backup Quicken File**.
   b. Download the latest Quicken Update. Choose **Help > Check for Updates**.

On the 2nd Step:

1. Deactivate online banking connection for accounts connected to financial institution that is requesting this change.
   a. Choose **Tools > Account List**.
   b. Click **Edit** on the account to deactivate.
   c. In Account Details, click **Online Services**.
   d. Click **Deactivate**. Follow prompts to confirm deactivation.
   e. Click the **General** tab.
   f. Delete Financial Institution and Account Number information.
   g. Click **OK** to close window.
   h. Repeat steps for any additional accounts.

2. Reconnect online banking connection for accounts that apply.
   a. Download a Quicken Web Connect file from your financial institution's online banking site.
   b. Logon to Legacy Digital Banking and click on the account you need to upload.
   c. On the account page on the top right corner of the Transactions section click on the down arrow to download a file
   d. In the popup window, select the format QFX and the date range you wish to upload into Quicken. Click Download.
   e. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.

      Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.

      Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

      Repeat this step for each account you have connected to this institution.

Quicken Mac Web

Connect On the 1st Step:

1. Backup your Quicken Mac data file and update the application.
    a. Choose **File > Save a Backup**.
    b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
    a. Complete last transaction update before the change to get all of your transaction history up to date.
    b. Repeat this step for each account you need to update.
    c. Accept all new transactions into the appropriate registers.

On the 2nd Step:

Activate online banking connection for accounts connected to financial institution that is requesting this change.

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter your financial institution name in the search field, select the correct option and click **Continue**.
5. Log into your financial institutions online banking site and download your transactions to your computer.

    Important: 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.

    a. Logon to Legacy Digital Banking and click on the account you need to upload.
    b. On the account page on the top right corner of the Transactions section click on the down arrow to download a file
    c. In the popup window, select the format QFX and the date range you wish to upload into Quicken. Click Download.
6. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web Connect** for the “Connection Type” if prompted
7. In the “Accounts Found” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, click **Link** to pick your existing account.

    Important: Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken.
8. Click **Finish**.