

Quicken® Personal Finance Software 2007-2008 for Windows® Account Conversion Instructions

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.



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

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.**

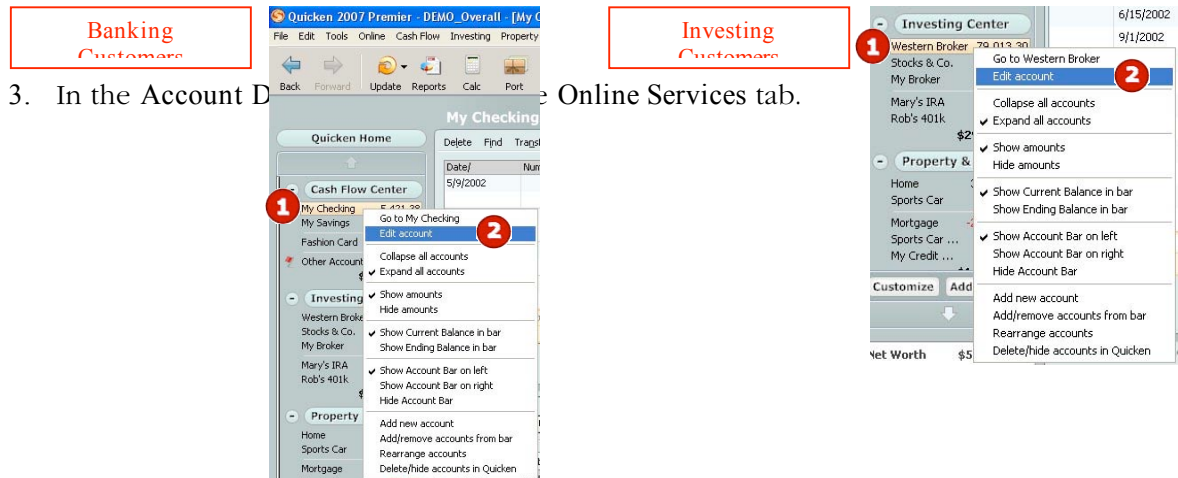
Important: You will not be able to proceed to the next section until you accept all transactions in the Downloaded Transactions tab.

- ▲ 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.

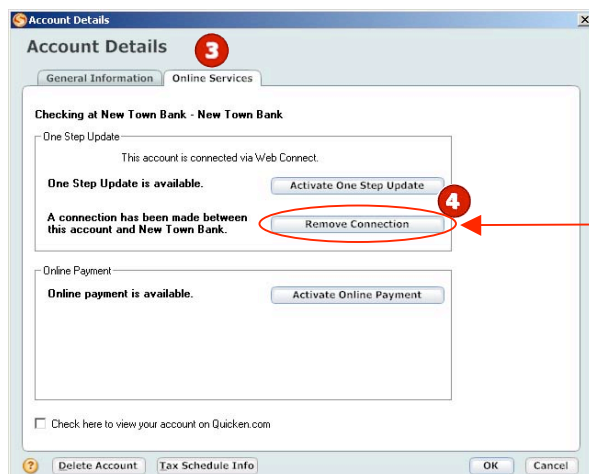
D.

DEACTIVATE YOUR ACCOUNTS

1. *Quicken banking customers:* right-click your first account from the list under Cash Flow Center. *Quicken investing customers:* right-click your first account in the Investing Center.
2. Select Edit account from the pop-up menu. **Update Account Number and Routing Number as needed.**



3. In the Account Details 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**.

in which you download transactions.

E.

ACTIVATE YOUR ACCOUNTS

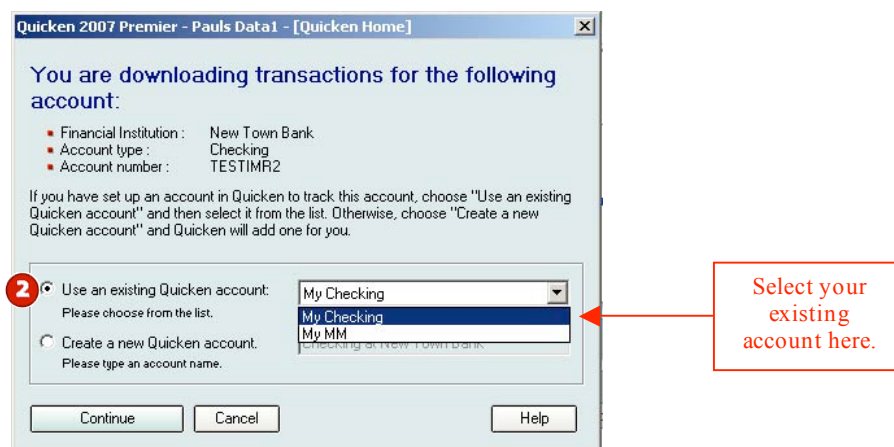
IMPORTANT: Complete section E after the conversion.



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!