Quicken Windows Web Connect

On the 1st Action Date:

- 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.
- 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 Action Date:

- 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.
 - Download a Quicken Web Connect file from your financial institution's online banking site.
 - b. In Quicken, choose File > File Import > Web Connect (.QFX) File.
 - c. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
 - d. 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.
 - e. Repeat this step for each account you have connected to this institution.

Quicken Mac Web Connect

On the 1st Action Date:

- 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 Action Date:

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.
- 6. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web Connect** for the "Connection Type" if prompted
- 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.