

Quicken® Personal Finance Software 2007-2009 for Windows® Bank Account Conversion Instructions

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 FROM YOUR BANK



1. Log in to your bank's Web site. Download your transactions through November 16, 2009 into Quicken.

Note: You will not be able to download these transactions after November 13, 2009.

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.

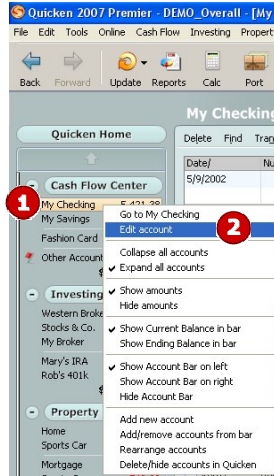
- ▲ For help accepting transactions, choose **Help** menu → **Quicken Help**. In the **Type in the word(s) to search for:** prompt, enter **Accept downloaded transactions**.
- ▲ For assistance reconciling your account register, choose **Help** menu → **Quicken Help**. In the **Type in the word(s) to search for:** prompt, enter **Reconciling an account**.

D.

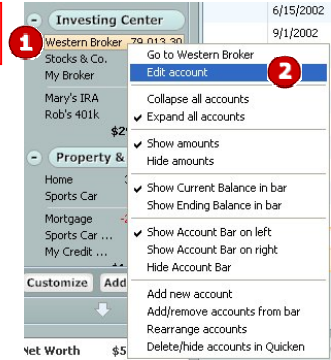
DEACTIVATE YOUR ACCOUNTS WITH YOUR BANK

1. *Quicken banking customers:* right-click your first bank account from the list under **Cash Flow Center**.
Quicken investing customers: right-click your first bank account in the **Investing Center**.
2. Select **Edit account** from the pop-up menu. **Edit account number, etc. as needed.**

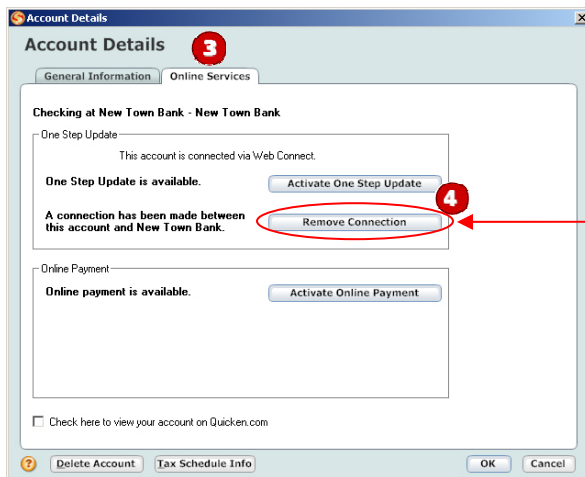
Banking Customers



Investing Customers



3. In the **Account Details** dialog, click the **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**.

4. Click **Remove Connection** or **Remove from One Step Update** in the **One Step Update** area. Confirm the remaining prompts.
5. Click the **General Information** tab. In the Financial Institution field, type your bank's name. Optionally, edit the **Account Name** field to reflect the new financial institution.
6. Click **OK** to close the **Account Details** dialog.

Repeat steps **1** through **6** for each bank account from which you download transactions.

E.

ACTIVATE YOUR ACCOUNTS WITH YOUR BANK

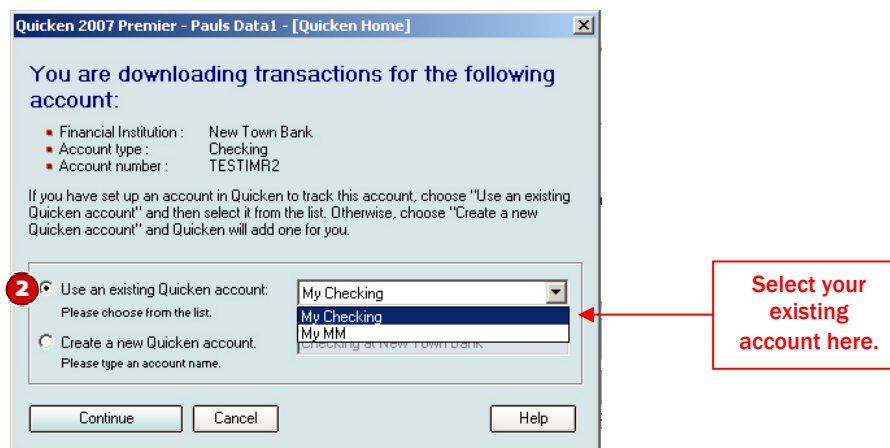
IMPORTANT: Complete section **E** *on or after* November 16, 2009.



1. Anytime on or after November 16, 2009 open a Web browser and log in to your bank'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 from your bank.

2. Click the **Use an existing Quicken account** radio button. In the corresponding drop-down list, select the Quicken account that you used for your bank.



Repeat steps **1** and **2** for each account that you will use for online banking or investing with your bank.

F.

AUTOMATING YOUR WEB CONNECT DOWNLOADS [OPTIONAL]

Express Web Connect provides the option of activating the One Step Update feature, which automates the downloading of Web Connect data. To activate the One Step Update feature, take either of these actions:

- If you see the **Activate One Step Update** prompt during the Web Connect download process, click **Yes**, and then click **Activate**.
- From Quicken, choose **Online** menu → **One Step Update**. In the dialog that displays, choose **Activate One Step Update** link next to your bank.

Once activated, you can choose **Online** menu → **One Step Update** to perform downloads.

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!

If you have any questions regarding these instructions, then click <http://www.quicken.com/conversionfaqs> to

access [Quicken FAQs for Financial Institution Conversion Customers](#).

You may also contact your bank or refer to: <http://www.intuit.com/support/quicken>.

Please note that if you are using the Express Web Connect feature with software versions other than 2009, you will no longer have the ability to perform the One Step Update. However, you will still be able to pull information into your software by the manual download process and then importing it into your software.