Quicken for Windows Conversion Instructions

Quicken for Windows 2012-2014

Express Web Connect

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Introduction

As ***First State Bank & Trust*** completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your login credentials for the ***First State Bank & Trust*** Internet Banking system.

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

NOTE:	This update is time sensitive and can be completed on or after ***June 23, 2014***.

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Quicken Help**. Search for ***Backup Data File*** and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Quicken Help**. Search for ***Update Software*** and follow the instructions.

Task 2: Deactivate Your Account(s) At [First State Bank & Trust, KS]

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** or **Edit Details** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate** or **Remove from One Step Update**. Follow the prompts to confirm the deactivation.

NOTE:	The name of the buttons referenced above may vary depending on the services you currently use and the version of Quicken you are using.

5. Click on the **General** or **General Information** tab. Remove the **Account Number**.
6. Remove the name of the **Financial Institution**. Click **OK** to close the window.
7. Repeat steps 2—6 for each account at ***[First State Bank & Trust, KS]***.

Task 3: Re-activate Your Account(s) at [First State Bank & Trust, KS]

1. Open the account register that you want to enable for online account access.
2. Choose **Account Actions** menu > **Set Up Online**.
3. Enter ***[First State Bank & Trust, KS]*** and click **Next**.
4. Type your **User ID** and **Password**. Click **Connect**.

NOTE:	You may be presented with a security question from the Internet Banking system prior to receiving your accounts.

5. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link** or **Exists in Quicken** and select the matching accounts in the drop-down menu.

IMPORTANT:	Do **NOT** select **New** or **Add In Quicken**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

6. After all accounts have been matched, click **Next**.

   You will receive confirmation that your account(s) have been added.

7. Click **Done** or **Finish**.

NOTE:	Express Web Connect users may experience a 2-3 day delay before the service is reactivated.
NOTE:	Duplicate Transactions – There is a possibility that you may experience duplicate transactions in your register after account reactivation. This is usually caused by the user overlapping the date range when importing the Web Connect file. Depending on the number of duplicate transactions imported, the best solution may be to restore the backup file created earlier in the conversion process. If there are not many transactions, they can be deleted prior to, or after accepting them to the register.
NOTE:	This can also be caused by a preference that is available in Quicken for Windows, "Automatically add downloaded transactions to register".
NOTE:	Specific steps/recommendations based on products can be found in the Post Conversion Issue Help Guide.

Thank you for making these important changes!