

# Quicken Conversion Instructions

## Quicken Windows Direct Connect & Express Web Connect

Instructions for One-Step Update initiated within Quicken

**IMPORTANT: Express Web Connect will not be available until Tuesday, December 15** so please utilize another connectivity type if you need transaction updates during this downtime.

**On or After Tuesday, December 8:** Disconnect & Reconnect Your Accounts

### Step 1: Disconnect Your Accounts

1. Choose **Tools > Account List**.
2. Click **Edit** on the account to deactivate.
3. In **Account Details**, click **Online Services**.
4. Click **Deactivate**. Follow prompts to confirm deactivation.
5. Click the **General** tab.
6. Delete Financial Institution and Account Number information. Click **OK** to close window.
7. Repeat steps for any additional accounts that apply.

### Step 2: Reconnect Your Accounts

1. Choose **Tools > Account List**.
2. Click **Edit** on the account you want to activate.
3. In **Account Details**, click **Online Services** and then choose **Set up Now**.
4. Type the Bank's name in the search field and click **Next**.
5. Enter your financial institution credentials. Express Web Connect uses the same credentials you as Online Banking. Direct Connect might not match your Online Banking credentials.
6. Select **Link to an existing account** and select the matching accounts in the drop-down menu.  
**IMPORTANT: Do NOT choose "Create a new account" unless you intend to add a new account to Quicken.** If you are presented with accounts you do not want to track in this data file, choose Ignore – Don't Download into Quicken or click Cancel.
7. After all accounts have been matched, click **Next** and then **Done**.