

Quicken Conversion Instructions

Quicken Windows Web Connect

Instructions for downloading a Web Connect File from Online Banking

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. Download a Quicken Web Connect file from Online Banking.
2. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
3. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
4. 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.
5. Repeat this step for each account you have connected to this institution.