

# Online Banking Web Connect Conversion Quicken Windows 2009



As your financial institution completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your customer ID, PIN/Password and security questions.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online banking service may stop functioning properly. This conversion should take 15–20 minutes.

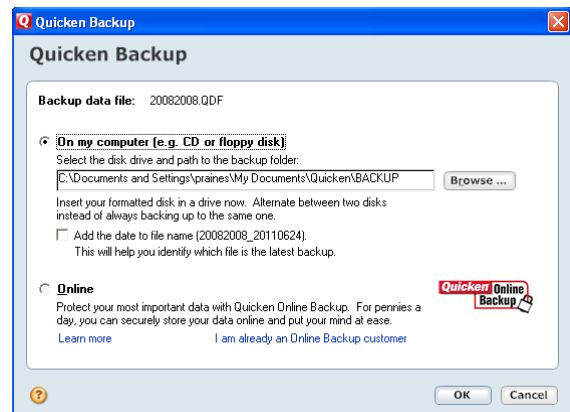


This update is time sensitive and can be completed on or after [08/15/2011](#).

## 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.

WC\_WC Customer Conversion Guide  
Last Updated 7/2011



## Download the Latest Quicken Update

1. Click on the Online menu → select One Step Update (Click Cancel if presented with Password Vault dialog box).
2. Uncheck all boxes → click Update Now in the One Step Update Settings dialog box.
3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.
4. When the update is completed, close and reopen Quicken.

## Get Your Latest Transactions

1. Log into your financial institution's web site → Download your transactions into Quicken.
2. Once the transactions are downloaded, accept all the transactions into your Quicken account register.
3. Repeat steps 1 and 2 for each account that you use for online banking or investing.



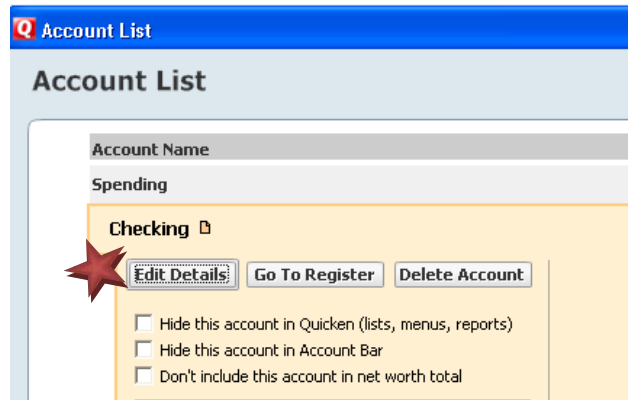
**Note:** You may not be able to download these transactions after the conversion.



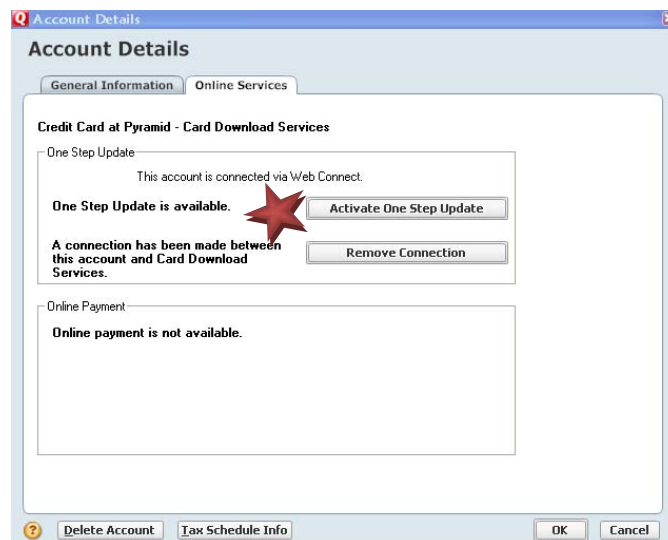
**Important:** You will not be able to proceed to the next section until you accept all transactions in the Downloaded Transactions tab.

# Deactivate Web Connect

1. Click on the Tools menu → select Account List. Highlight the account you want to deactivate → click on the Edit Details button.



2. Click the Online Services tab → click the Remove Connection button.



3. Quicken will prompt you to confirm deactivation → click Yes → click OK

4. Select the General Information tab and remove the Financial Institution Name and Account Number as shown below → click OK to save changes.

**Account Details**

General Information | Online Services

Account Name: Banking : Savings

Description: Financial Institution Name

Account Type: 999999999

Tax-Deferred:  Yes  No

Interest Rate: %

Contact Name:

Phone:

Home page: Bank Web page

Activity page: Activity Web page

Other page: Other Web page

Comments:

4. Repeat this step for each account you need to deactivate from online banking.

## Activate Web Connect

1. Log into your FI website from an external browser to initiate a download of a Web Connect file into Quicken (.QFX). When presented with the screen below, choose the "Use an existing Quicken account" radio button

**You are downloading transactions for the following account:**

- Financial Institution : Target National Bank
- Account type : Credit Card
- Account number :

If you have set up an account in Quicken to track this account, choose "Use an existing Quicken account" and then select it from the list. Otherwise, choose "Create a new Quicken account" and Quicken will add one for you.

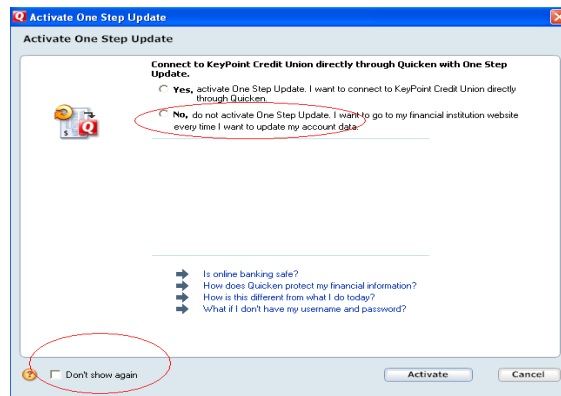
Use an existing Quicken account: Target Credit Card xxxx-xxxx-xxxx-4466  
Please choose from the list.

Create a new Quicken account: Credit Card at Target National Bank  
Please type an account name.

2. The One Step Update Summary screen will appear, confirming the account updated successfully.
3. Repeat steps 1 and 2 for each account that you use for online banking or investing



NOTE: Now the account will be connected via Web Connect. Quicken may prompt to activate One Step Update after a successful Web Connect download. Please select No do not activate and check the box to not be prompted again.



**Congratulations, you have completed the necessary changes!**