

Quicken for Windows Conversion Instructions

Quicken for Windows 2011-2014

Express Web Connect to Web Connect

Table of Contents

TABLE OF CONTENTS1

INTRODUCTION2

DOCUMENTATION AND PROCEDURES2

- Task 1: Conversion Preparation.....2
- Task 2: Connect to [Financial Institution A]2
- Task 3: Deactivate Your Account(s) At [Financial Institution A].....3
- Task 4: Re-activate Your Account(s) at [Financial Institution B].....3



WEBER STATE CREDIT UNION

Introduction

As **[Financial Institution A]** completes its system conversion to **[Financial Institution B]**, 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 **[Financial Institution A]** and **[Financial Institution B]** websites.

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 **[Enter Date]**.

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: Connect to [Financial Institution A]

1. Choose **Tools** menu > **One Step Update**.
2. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.
3. In the **One Step Update Settings** dialog, make sure all items are checked and click **Update Now**.
4. If new transactions display in the **Online Update Summary**, accept them in your Quicken account register.

Task 3: Deactivate Your Account(s) At [Financial Institution A]

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 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 2-7 for each account at *[Financial Institution A]*.

Task 4: Re-activate Your Account(s) at [Financial Institution B]

1. Log in to *[Financial Institution B]* web site at *[Financial Institution B URL]*.
2. Download and import your transactions to Quicken.
3. 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 **Create a new account** or **Create a new Quicken account**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.

4. Repeat steps 2 – 3 for all of your accounts.

Thank you for making these important changes!