

# Quicken® Personal Finance Software 2007-2009 for Windows®

## Account Conversion Instructions

### Converting Direct Connect to Web Connect

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 and PIN and to be able to log in to the Web site. **This update may be time sensitive.**

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

To see how your downloading experience will change after your account conversion, click [here](#).

**Note:** In the following screen shots, red icon numbers match step number instructions. All financial institution and register information is fictitious and for illustration only.



This detour symbol indicates section instructions that are for bill pay customers only. If you do *not* use Quicken to make online bill payments, then you can skip these sections or steps.



Throughout this guide, this symbol displays to indicate that there are optional FAQs.

## A.

### BACK UP YOUR CURRENT DATA (ALL customers)

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**.

## B.

### DOWNLOAD THE LATEST QUICKEN UPDATE (ALL customers)

1. Choose **Online** menu → **One Step Update**.
2. In the **One Step Update** dialog, click **Update Now**.
3. If a software update is available, then you will be prompted to apply it now.
4. Once the update is complete, restart Quicken.

## DELETE REPEATING ONLINE PAYMENTS (BILL PAY customers only)

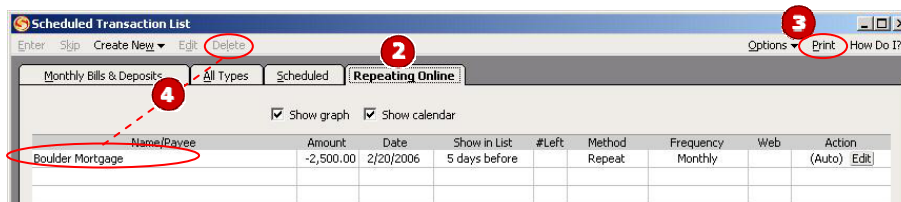
A repeating online payment is one made automatically by Quicken after you have sent one initial online payment instruction that specifies the payment amount, frequency, and delivery dates. After creation, your financial institution will continue to send payments until you cancel the transaction or until it expires.



**BILL PAY ONLY:** If you do not use online bill payment, then skip to [section E](#).

**IMPORTANT:** Online bill payment no longer will be available after this conversion. Contact your financial institution to sign up for Web-based bill payment.

1. Choose **Cash Flow** menu → **Scheduled Transaction List**.



2. Click the **Repeating Online** tab. If the list is empty, then skip to [section D](#).
3. Click **Print** to save your list of repeating payments. (You'll use this to make these payments later using another method.)
4. Click to highlight the first payment in the Name/Payee column, and click **Delete**. Click **Delete** again to confirm. The transaction Method changes from Repeat to Rept-Cancel.

Repeat step **4** for each additional repeating online payment.

5. Close the Scheduled Transaction List dialog when complete.

# D.

## DELETE PENDING ONLINE PAYMENTS (BILL PAY customers only)

A pending online payment is a single payment entered and sent; however, this payment has not been processed yet by your financial institution.



**BILL PAY ONLY:** If you do not use online bill payment, then skip to [section E](#).

**IMPORTANT:** Online bill payment no longer will be available after this conversion. Contact your financial institution to sign up for Web-based bill payment.

1. Choose **Online** menu → **Online Center**.

Payee	Amount	Num	Status	Processing	Delivery
Starbucks	15.00		Scheduled for delivery on 2/21/2006		2/21/2006
Day Care	100.00		Cancel payment instruction ready to send		2/16/2006
<new payment>					

2. Select the **Financial Institution** from the drop-down list.

3. Click the **Payments** tab.

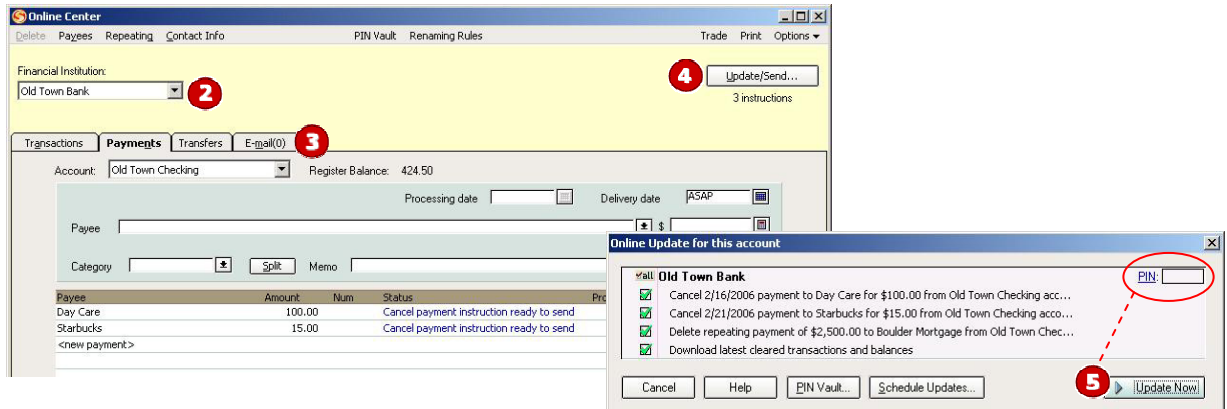
4. Click **Print** to save your list of pending payments. (You'll use this to make these payments later using another method.)

5. You will need to cancel payment for each Payee with a Status that is Scheduled for delivery on... a date after the conversion. Select the first payee, and click **Cancel Payment**. The Status column reflects this change by noting Cancel payment instruction ready to send.

Repeat step 5 for each payee with a pending payment after the conversion date.

## GET YOUR LATEST TRANSACTIONS (ALL customers)

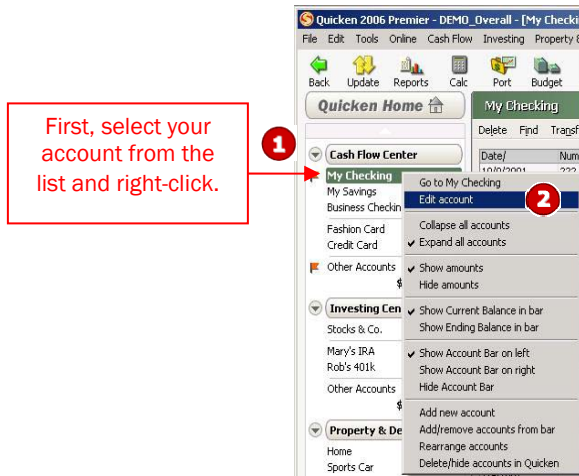
1. Choose **Online** menu → **Online Center**.



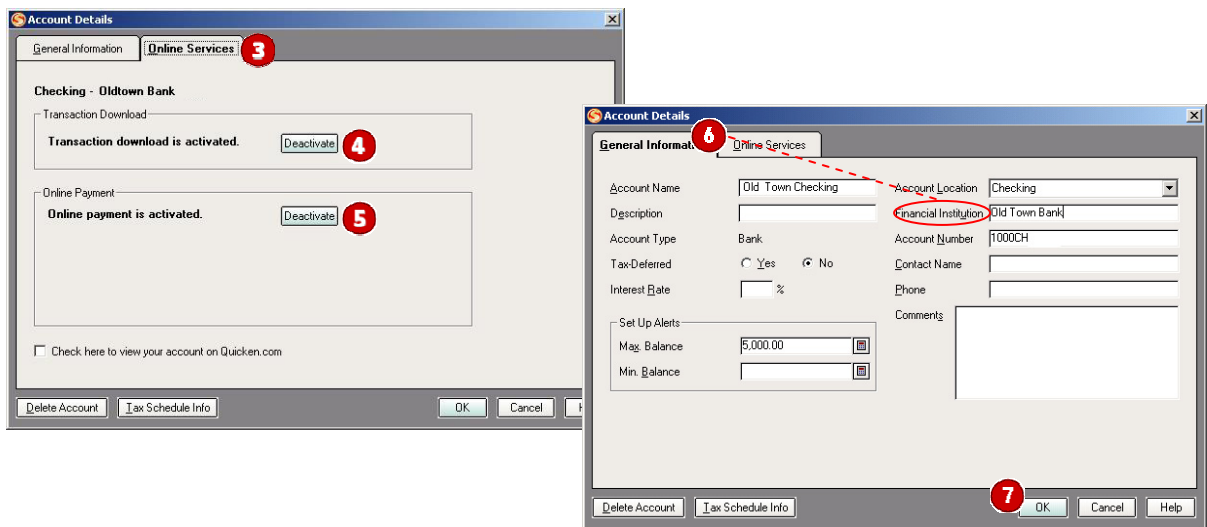
2. Select your financial institution from the **Financial Institution** drop-down list.
3. Click the **E-mail** tab and view any e-mails, if necessary.
4. Click **Update/Send....**
5. In the Online Update for this account dialog, make sure all items are checked. Enter your password, and then click **Update Now**.
6. If new transactions display in the Online Update Summary window, then accept them in your Quicken account register.
  - ▲ For help accepting transactions, choose **Help** menu → **Quicken Help**. In the Type in the word(s) to search for: prompt, enter **Accept downloaded transactions into my transaction list**.
  - ▲ For assistance reconciling your account register, choose **Help** menu → **Quicken Help**. In the Type in the word(s) to search for: prompt, enter **Reconciling an account**.

## DEACTIVATE YOUR ACCOUNTS FROM DIRECT CONNECT (ALL customers)

1. Right-click your account from the list of accounts under Cash Flow Center.



2. Select **Edit account** from the drop-down list. **Edit your Account Number if needed.**



3. Click the **Online Services** tab.
4. Click **Deactivate** for Transaction Download. Confirm the remaining prompts.
5. Click **Deactivate** for Online Payment, if applicable. Confirm the remaining prompts.
6. Click the General Information tab. In the Financial Institution field, type your financial institution's name.
7. Click **OK** to close the Account Details dialog.

Repeat steps **1** through **7** for each account (such as checking, savings, credit cards, and brokerage). Verify that each account is deactivated by choosing **Tools** menu → **Account List**. As each online account is deactivated, the word **Activated** disappears for each account in the Online Services column.

# G.

## ACTIVATE YOUR ACCOUNTS FOR WEB CONNECT (ALL customers)

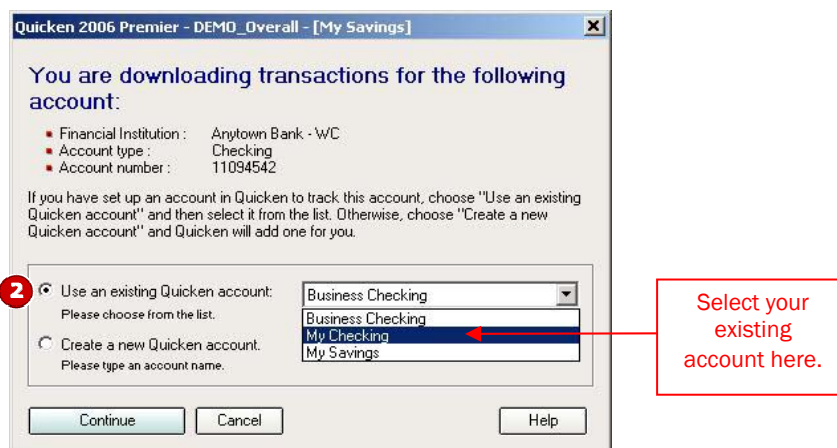
**IMPORTANT:** Complete section **G** *on or after* the conversion date.



1. Anytime on or after the conversion, log in to your financial institution's Web site. Download your transactions into Quicken.

**Important:** To avoid the possibility of creating duplicate records when downloading into Quicken, select a "from" date that does not include records previously downloaded.

2. Click the **Use an existing Quicken account** radio button. In the corresponding drop-down list, select the applicable Quicken account.



Repeat steps **1** and **2** for each account that you will use for online banking or investing.

**THANK YOU FOR MAKING THESE IMPORTANT CHANGES!**

As a result of this system conversion, online bill payment within Quicken is no longer available. Contact your financial institution to sign up for Web-based bill payment.