


Quicken® Personal Finance Software 2007 for Windows® Account Conversion Instructions

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 to be able to log in to the Web sites.

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 10 minutes.

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.

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

A.

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**.

B.

DOWNLOAD THE LATEST QUICKEN UPDATE

1. Choose **Online** menu → **One Step Update**.
2. In the One Step Update Settings dialog, uncheck any boxes that are checked, and then 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.

C.

GET YOUR LATEST TRANSACTIONS



1. Log in to your financial institution's Web site and download your transactions into Quicken.

Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

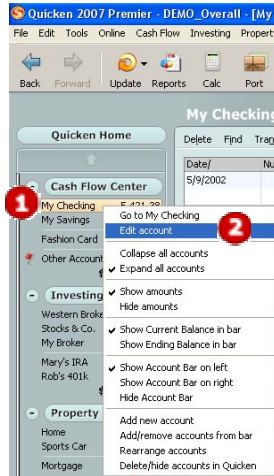
2. Once the transactions are downloaded, **accept all the transactions into your Quicken account register.**

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

- ▲ For help accepting transactions, choose **Help** menu → **Quicken Help**. In the Type in the word(s) to search for: prompt, enter **Accept downloaded transactions**.
- ▲ 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**.

1. *Quicken banking customers:* right-click your first account from the list under Cash Flow Center.
Quicken investing customers: right-click your first account in the Investing Center.
2. Select **Edit account** from the pop-up menu.

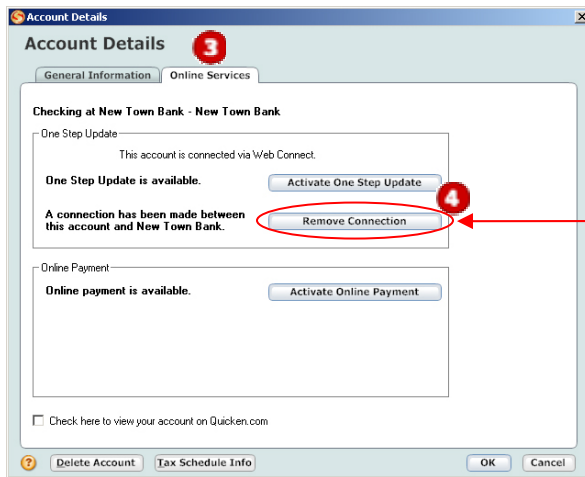
Banking Customers



Investing Customers



3. In the Account Details dialog, click the **Online Services** tab.



This button varies:

- If you manually download transactions, this button displays as **Remove Connection**.
- If you use One Step Update to automate downloading your transactions, this button displays as **Remove from One Step Update**.

4. Click **Remove Connection** or **Remove from One Step Update** in the One Step Update area. Confirm the remaining prompts.
5. Click the **General Information** tab. In the Financial Institution field, type the name of your financial institution. Optionally, edit the Account Name field to reflect the new financial institution.
6. Click **OK** to close the Account Details dialog.

Repeat steps **1** through **6** for each account from which you download transactions.

E.

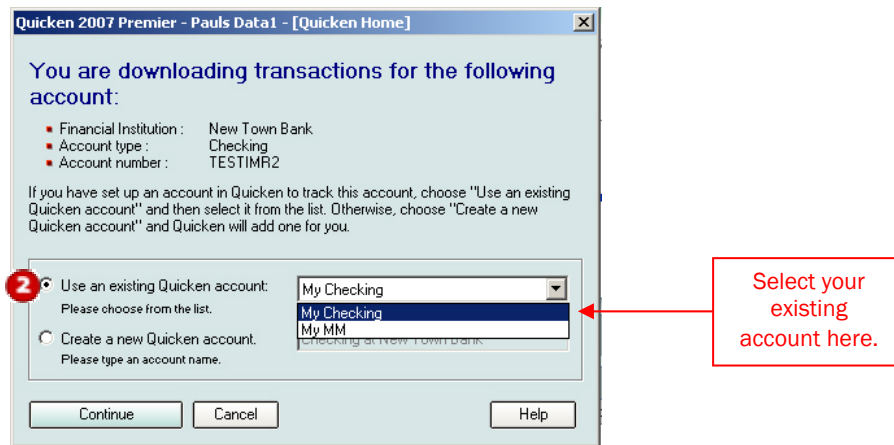
ACTIVATE YOUR ACCOUNTS

1. Open a Web browser and log in to your financial institution's Web site and download your transactions into Quicken.

Download to
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 Quicken account.



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

F.

AUTOMATING YOUR WEB CONNECT DOWNLOADS

Express Web Connect provides the option of activating the One Step Update feature, which automates the downloading of Web Connect data. To activate the One Step Update feature, take either of these actions:

- If you see the **Activate One Step Update** prompt during the Web Connect download process, click **Yes**, and then click **Activate**.
- From Quicken, choose **Online** menu → **One Step Update**. In the dialog that displays, choose **Activate One Step Update** link next to your financial institution's name.

Once activated, you can choose **Online** menu → **One Step Update** to perform downloads.

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!