Online Banking Web Connect Conversion Quicken Windows 2008-2010



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.

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 15–30 minutes.

BACK UP YOUR CURRENT DATA

- **1.** Choose File menu \rightarrow Backup.
- **2.** Specify which file to back up and where you want the backup saved in the Quicken Backup dialog, and then click OK.

DOWNLOAD THE LATEST QUICKEN UPDATE



- 1. Click the Update icon on the Quicken toolbar.
- 2. Uncheck all boxes \rightarrow Update Now in the One Step Update Settings dialog.
- **3.** If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.

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4. When the update is completed, close Quicken. Reopen Quicken.

GET YOU LATEST TRANSACTIONS

Download to Quicken⁻

- **1.** Log in to your financial institution's Web site, if available. Download your transactions into Quicken.
- **2.** Once the transactions are downloaded, accept all the transactions into your Quicken account register.
- **3.** Repeat this step for each account (such as checking, savings, credit cards, and brokerage) 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 YOUR ACCOUNT FROM WEB CONNECT

- 1. Right click the account in the Quicken Account List
- 2. Select Edit Account from pop-up.

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3. Click the Online Services tab \rightarrow click the Remove Connection button

Account Details		
Account Details		
General Information Online Services		
Credit Card at Pyramid - Card Download Se	rvices	
One Step Update		1
This account is connected via \	Web Connect.	
One Step Update is available.	Activate One Step Update	
A connection has been made between this account and Card Download Services.	Remove Connection	
□ Online Payment		-
Online naument is not available		
oninic payment is not available.		
Delete Account Tax Schedule Info		OK Cancel

4. Quicken will prompt you to confirm deactivation \rightarrow click Yes \rightarrow click ok

ACTIVATE WEB CONNECT



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1. Login to 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

 Financial Institution : Account type : Account number : 	Target Natio Credit Card	nal Bank
If you have set up an accou Quicken account" and then	nt in Quicken select it from	o track this account, choose "Use an exis he list. Otherwise, choose "Create a new a for unu
Quicken account and Quic	Ken will aug o	ic for you.
Use an existing Quicke	n account:	Target Credit Card xxxx-xxxx-4466
Use an existing Quicke Please choose from the lis	en account:	Target Credit Card xxxx xxxx 4466

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. Screen shot on the next page.

ctivate One Step U	pdate
	Connect to KeyPoint Credit Union directly through Quicken with One Step Update.
	to yes, activate one step opdate. I want to connect to keyPoint cledit onion directly through Quicken.
- 👰 🔇	No, do not activate One Step Update. I want to go to my financial institution website every time I want to update my account data.
	Is online banking safe?
	How does Quicken protect my financial information?
	 How is this different from what I do today? What if I don't have my usemame and password?
	 How is this different from what I do today? What if I don't have my username and password?
	 How is this different from what I do today? What if I don't have my username and password?
	How is this all effect it from orbit if all today? What if i don't have my username and password?

Thank you for making these important changes!

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