

Quicken for Windows Conversion Instructions

Express Web Connect

Introduction

As your financial institution completes its system conversion, 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 online banking.

NOTE: Express Web Connect uses the same User ID and Password as your financial institution's website.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. Go to File > Backup and Restore > Backup Quicken File.
2. Download the latest Quicken Update. Go to **Help > Check for Updates**

Task 2: Complete a final transaction download

If new transactions were received from your connection, accept all new transactions into the appropriate registers.

1. Complete a final transaction update to update your transaction history.
2. Repeat this process for each account you need to update.
3. Accept all new transactions into the appropriate registers.

Task 3: Disconnect Accounts in Quicken

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate**. Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. Repeat steps for each account to be disconnected.

Task 4: Reconnect Accounts to *First Mid Bank & Trust*

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to activate.
3. In the **Account Details** dialog, click the **Online Services** tab.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter your financial institution in the search field, select the name in the list and click **Next**.
7. If presented with the Select Connection Method screen, select **Express Web Connect**.
8. Enter your online banking credentials. Click **Connect**.

NOTE: You may be presented with a security question from your Financial Institutions prior to receiving your accounts.

9. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching accounts in the drop-down menu.

IMPORTANT: Do **NOT** select **Create a new account** unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
11. Click **Done** or **Finish**.