Quicken for Windows Conversion Instructions

Quicken for Windows 2010-2012 (Direct Connect to Direct Connect)

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Introduction

As **BankFIRST-OLD** completes its system conversion to **BankFIRST-NEW,** you will need to modify your Quicken settings to ensure the smooth transition of your data.

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 **November 5th, 2012**.

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 BankFIRST-OLD

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 BankFIRST-OLD

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 on **Deactivate** or **Deactivate Online Payment** (only available if you use bill pay services). Follow the prompts to confirm the deactivation.
5. 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.

6. Click on the **General** or **General Information** tab.
7. Remove the name of **BankFIRST-OLD**. Click **OK** to close the window.
8. Repeat steps 2 – 7 for each account at **BankFIRST-OLD**.

Task 4: **Re-activate Your Account(s) at BankFIRST-NEW**

1. Open the account register that you want to enable for online account access.
2. Choose **Account Actions** menu > **Set Up Online**.
3. Enter **BankFIRST-NEW** and click **Next**.
4. Type your **User ID** and **Password**. Click **Connect**.
5. You will be presented with a list of accounts available for online access.
6. 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 **New** or **Add In Quicken**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

7. After all accounts have been matched, click **Next**.

   You will receive confirmation that your account(s) have been added.
8. Click **Done** or **Finish**.

Thank you for making these important changes!