

Online Banking Direct to Web Connect Conversion Quicken Windows 2009

As United Savings 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 login and password.

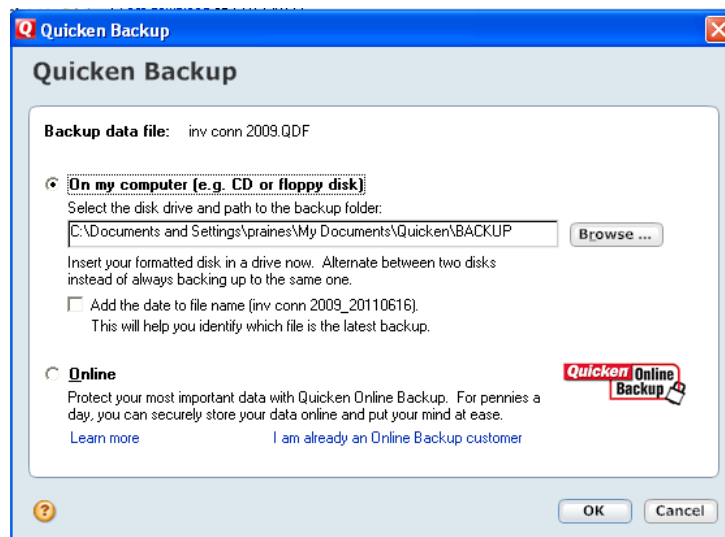
It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online banking service may stop functioning properly. This conversion should take 15–30 minutes.



This update is time sensitive and can be completed on or after **January 23, 2012**.

Back Up Your Current Data

1. Choose File menu → Backup.
2. Specify where to back up your Quicken file → click OK.



Download the Latest Quicken Update

1. Click on the Online menu and select One Step Update (Click Cancel if presented with Password Vault dialog)
2. Uncheck all boxes → 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.
4. When the update is completed, close Quicken and reopen Quicken.

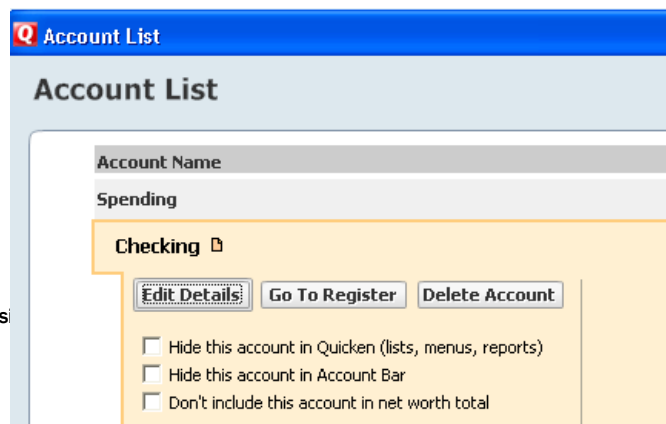
Change Download Preferences

1. Click on the Edit menu → click on Preferences → Quicken Program
2. Select Downloaded Transactions in left column
3. Remove check from “Automatic Transaction Entry”, if applicable

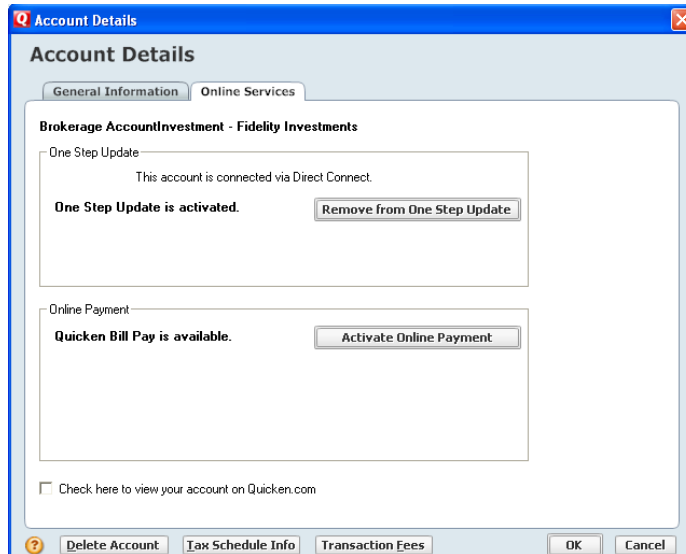
Deactivate your Account From Direct Connect

1. Click on the Tools menu → select Account List. Highlight the account you want to deactivate → click on the Edit Details button.

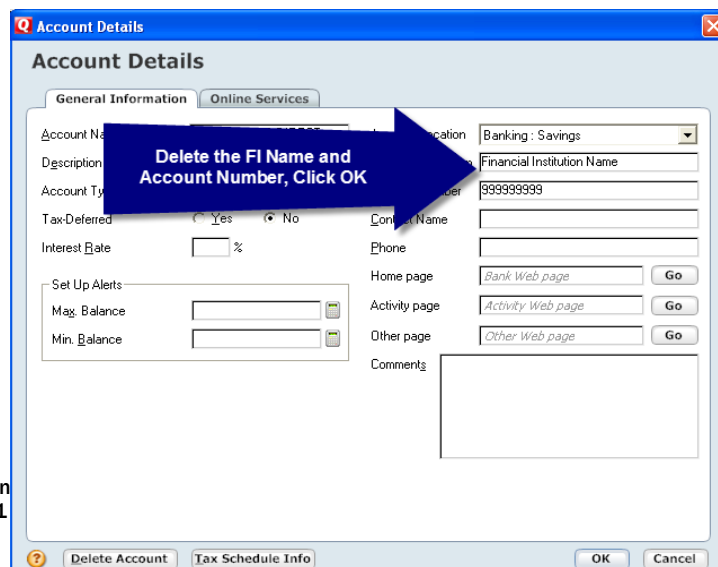
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2. Click the Online Services tab. In the One Step Update section, it will state the connection method being used. Disable the account by clicking on the **"Remove from One Step Update"** button.



3. Quicken will prompt you to confirm deactivation → click Yes → click ok
4. Select the General tab and remove the Financial Institution Name and Account Number as shown below → click OK to save changes.



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5. Repeat steps 1 through 4 for each account. 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.

Activate your Account for Web Connect



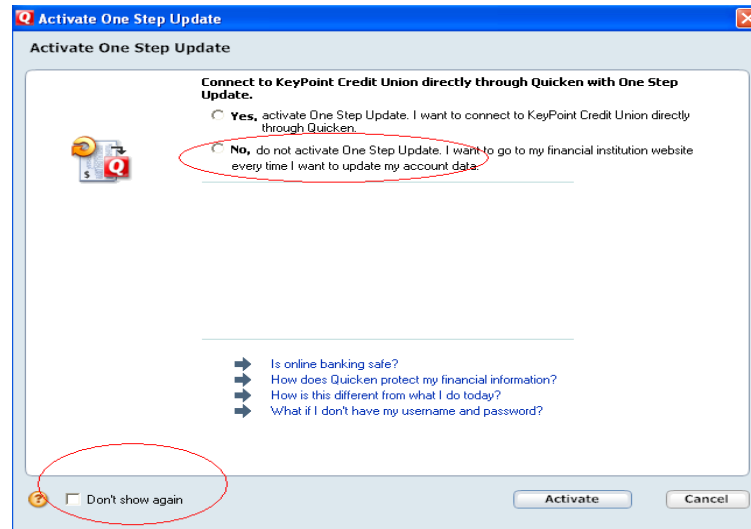
1. Log into your financial institution's website from an external browser to initiate a download of a Web Connect file into Quicken (.QFX). When presented with the screen below, choose the **"Use an existing Quicken account"** radio button. If you do not want to add an account to this file, select "Do Not Add in Quicken"

The screenshot shows a dialog box titled "You are downloading transactions for the following account:". It lists account details: Financial Institution: Target National Bank, Account type: Credit Card, and Account number: (partially obscured). Below this, it provides instructions: "If you have set up an account in Quicken to track this account, choose 'Use an existing Quicken account' and then select it from the list. Otherwise, choose 'Create a new Quicken account' and Quicken will add one for you." There are two radio button options: "Use an existing Quicken account:" with a dropdown menu showing "Target Credit Card xxxx-xxxx-xxxx-4466", and "Create a new Quicken account:" with a text input field containing "Credit Card at Target National Bank". A green lightning bolt icon points to the "Use an existing Quicken account:" radio button. At the bottom are "Continue", "Cancel", and "Help" buttons.

2. The One Step Update Summary screen will appear, confirming the account updated successfully.
3. Complete steps 1 and 2 to reactivate each account.



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.**



CONGRATULATIONS, you have completed the conversion!

Thank you for making these important changes!