



# Quicken Conversion Instructions

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## *Express Web Connect*

### Introduction

As Independence Bank completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

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

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**Task 1: *Optional task*** - Complete a final download **before 11/3/2019**

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

**NOTE:** If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions. The download will include activity through 10/23/19.

**\*If using a Mac, use the steps below to complete Task 1.**

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**Task 2: *Optional task*** - Complete a final download **before 11/3/2019**

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1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) you use for online banking or investing.

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**Task 3:** Disconnect Accounts in Quicken on or after **10/28/2019**

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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.

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**Task 4:** Reconnect Accounts to **Independence Bank** on or after **10/28/2019**

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8. Choose **Tools** menu > **Account List**.
9. Click the **Edit** button of the account you want to activate.
10. In the **Account Details** dialog, click the **Online Services** tab.
11. Click **Set up Now**.
12. Use **Advanced Setup** to activate your account.
13. Enter **Independence Bank** in the search field, select the name in the list and click **Next**.

14. If presented with the Select Connection Method screen, select **Express Web Connect**.

15. Enter your **User ID** and **Password**. Click **Connect**.

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

16. 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 **Add to Quicken** 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**.

17. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.

18. Click **Done** or **Finish**.

**\*If using a Mac, use the steps below to complete Task 3 and 4.**

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**Task 3:** Disconnect Accounts in Quicken on or after **10/28/2019**

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19. Select your account under the **Accounts** list on the left side.

20. Choose **Accounts** menu > **Settings**.

21. Select **Troubleshooting** > **Deactivate Downloads**.

22. Repeat steps for each account to be disconnected.

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**Task 4:** Reconnect Accounts to **Independence Bank** on or after **10/28/2019**

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23. Select your account under the **Accounts** list on the left side.

24. Choose **Accounts** menu > **Settings**.

25. Select **Set up transaction download**.

26. Enter **Independence Bank** in the **Search** field, select the name in the **Results** list and click **Continue**.

27. Enter your **User Id** and **Password** and click **Continue**.

28. If the bank requires extra information, enter it to continue.

**NOTE:** Select “Express Web Connect” or “Quicken Connect” for the “Connection Type” if prompted.

29. In the “**Accounts Found**” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select “**Link**” to pick your existing account.

**IMPORTANT:** Do **NOT** select “**ADD**” under the action column.

30. Select **Finish**.