Quicken Conversion Instructions

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.

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

1. Download your Quicken Web Connect file from Digital Banking.
2. Click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.
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. **Please note, this download will contain activity through 10/23/2019.**

If using a Mac, please follow the instruction below to complete Task 1.

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Sign in to online banking and download transactions for an account.
4. Import the transactions.
5. Repeat steps for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 2: Disconnect Accounts in Quicken on or after ***10/28/2019***

---

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

Task 3: Reconnect Accounts to Independence Bank on or after ***10/28/2019***

---

1. Download your Quicken Web Connect file from Digital Banking.

> **NOTE:** Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

2. Click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.
3. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

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** or click the **Cancel** button.

4. Repeat steps for each account to be reconnected.

If using a Mac, please follow the instruction below to complete Task 3.

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select Set up transaction download.
4. Enter Independence Bank in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Log in to Digital Banking. **Download** a file of your transactions to your computer.

NOTE:	Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

6. Drag and drop the downloaded file into the box **Drop download file**.

NOTE:	Select "Web Connect" for the "Connection Type" if prompted.

7. 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 unless you intend to add a new account to Quicken.

8. Click **Finish**.
9. Repeat steps for each account to be connected.