Quicken Conversion Instructions

Web Connect to Direct Connect

Introduction

As Independence Bank of Kentucky 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 and/or Direct Connect.

> **NOTE:** **Web Connect** uses the same User ID and Password as the **Independence** website. **Direct Connect** may require registration. Please contact **Independence Bank** to verify your Direct Connect login information.

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. File will contain activity through 10/23/19.

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

Task 1: ***Optional task*** - Complete a final download **before** ***11/3/19***

5. Select your account under the **Accounts** list on the left side.
6. Choose **Accounts** menu > **Update Selected Online Account**.
7. Sign in to online banking and download transactions for an account.
8. Import the transactions.
9. Repeat steps for each account that you use for online banking or investing.

Task 2: Disconnect Accounts in Quicken on or after 10/23/2019

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

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 on the Online Services tab.
4. Click Set up Now.

5. Use Advanced Setup to activate your account.

6. Enter ***Independence Bank of Kentucky*** in the search field, select the name in the list and click Next.

7. If presented with the Select Connection Method screen, select **Direct Connect**.

8. Type your Direct Connect **User ID** and **Password** and click **Connect**.

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 **Add to Quicken** unless you want 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**.

***If using a Mac, follow the steps below to complete Task 3.**

Task 3: Connect Accounts to ***Independence Bank*** on or after ***10/28/19.***

12. Select your account in the **Accounts** list on the left sidebar.

13. Choose **Accounts** menu > **Settings**.

14. Select **Set up transaction download.**

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

16. Enter your Direct Connect **User Id** and **Password** and click **Continue**.

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

> **NOTE:** Select "Direct Connect" for the "Connection Type" if prompted.

18. In the "**Accounts Found**" screen, associate each new account to accounts in your Quicken data file. Under the **Action** column, select "**Link"** to pick your existing account. When complete, click Finish.

> **IMPORTANT:** Do **NOT** select "**ADD**" under the action column unless you intend to add a new account to Quicken.