

Quicken for Windows Conversion Instructions

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

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Introduction

As **Congressional Bank-OLD** completes its system conversion to **Congressional Bank-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 26th, 2012**.

IMPORTANT:

- If you are unable to perform the upgrade on the planned migration date, please perform the upgrade as close to that date as possible.
- If you do not fully complete the change on the migration date, you may receive duplicate transactions. The fewer number of days between the planned date and the actual upgrade, the fewer transactions that could become duplicate entries within your register.
- Any duplicate transactions that may occur will need to be manually deleted from your Quicken register.
- If you fail to fully complete the change within the allotted 30 day period you may lose account history.
- If you fail to fully complete the change within the allotted 30 day period, you will need to key in the missing transactions or utilize Web Connect to download missing account history. You would then need to deactivate Web Connect and reactivate under the new BID for Direct Connect.

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 Congressional Bank-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 Congressional Bank-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 **Congressional Bank-OLD**. Click **OK** to close the window.
8. Repeat steps 2 – 7 for each account at **Congressional Bank-OLD**.

Task 4: Re-activate Your Account(s) at Congressional Bank-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 **Congressional Bank-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!