Quicken for Windows Conversion Instructions

Quicken for Windows 2012–2014

Web Connect

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Introduction

As *First State Bank & Trust* completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your login credentials for the *First State Bank & Trust* Internet Banking System.

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 *June 23, 2014*.

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for *Backing Up Your Data* and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for *Checking for Updates to Quicken* and follow the instructions.

Task 2: Deactivate Your Account(s) At [First State Bank & Trust, KS]

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 **Deactivate** or **Remove from One Step Update**. Follow the prompts to confirm the deactivation.

NOTE:	The name of the buttons referenced above may vary depending on the services and the version of Quicken you are using.

5. Click on the **General** or **General Information** tab. Remove the **Account Number**.

6. Remove the name of the **Financial Institution**. Click **OK** to close the window.

7. Repeat steps 2–6 for each account at *[First State Bank & Trust, KS]*.

Task 3: Re-activate Your Account(s) at First State Bank & Trust, KS

1. Log in to the Internet Banking system from First State Bank & Trust's web site at **www.firststateks.com.**

2. Download and import your transactions to Quicken.

3. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link** to an existing account or **Use an Existing** Quicken account and select the matching account in the drop-down menu.

IMPORTANT:	Do **NOT** select **Create a new account** or **Create a new Quicken account**. 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 2 – 3 for all of your accounts

NOTE:	Duplicate Transactions – There is a possibility that you may experience duplicate transactions in your register after account reactivation. This is usually caused by the user overlapping the date range when importing the Web Connect file. Depending on the number of duplicate transactions imported, the best solution may be to restore the backup file created earlier in the conversion process. If there are not many transactions, they can be deleted prior to, or after accepting them to the register.
NOTE:	This can also be caused by a preference that is available in Quicken for Windows, "Automatically add downloaded transactions to register".
NOTE:	Specific steps/recommendations based on products can be found in the Post Conversion Issue Help Guide.

Thank you for making these important changes!