

# Online Banking Web Connect Conversion Quicken Windows 2012

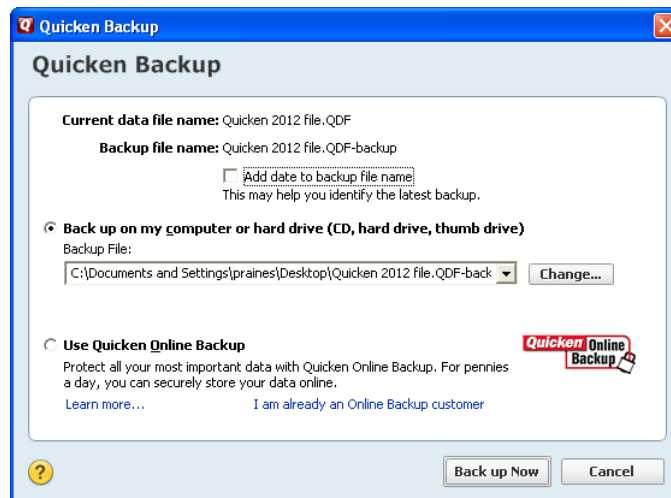


As your financial institution completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your customer ID/Password, PIN and security questions.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online banking service may stop functioning properly. This conversion should take 15–20 minutes.

## Back Up Your Current Data

1. Choose File menu → Backup and Restore → Back up Quicken file.
2. Specify where to back up your Quicken file → click Back up Now.



## Download the Latest Quicken Update

1. Click on the Tools menu and select One Step Update (If the Password Vault prompt appears, click Cancel).
2. Uncheck all boxes → Update Now in the One Step Update Settings dialog.
3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.
4. When the update is completed, close and reopen Quicken.

## Get Your Latest Transactions

1. Log into your financial institution's web site. Download your transactions into Quicken.
2. Once the transactions are downloaded, accept all the transactions into your Quicken account register.
3. Repeat this step for each account that you use for online banking or investing.



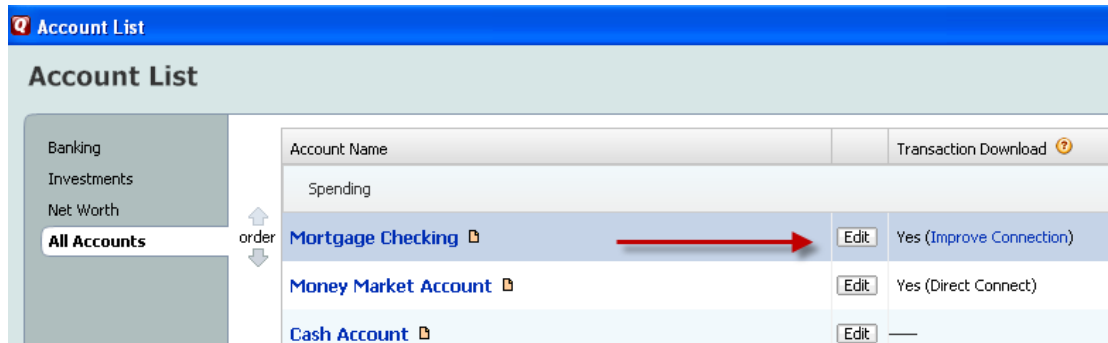
Note: You may not be able to download these transactions after the conversion.



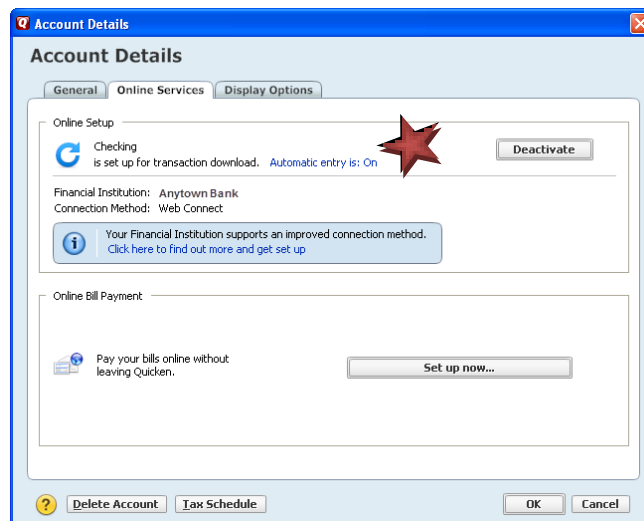
**Important:** You will not be able to proceed to the next section until you accept all transactions in the Downloaded Transactions tab.

# Deactivate Web Connect

1. Click on the Tools menu → select Account List. Highlight the account you want to deactivate → click on the Edit button.



2. Click the Online Services tab → click Deactivate.



3. Quicken will prompt you to confirm deactivation → click Yes.
4. If Automatic entry is On, click on the link and select No - Never automatically add transactions for this account. Click OK.

5. Select the General tab and remove the Financial Institution Name and Account Number as shown below → click OK to save changes.

**Account Details**

General Online Services Display Options

Account Name  Financial Institution  Anytown Bank

Description  Account Number  123456789

Account Type: Checking

Tax-Deferred ☐ Yes ☒ No

Interest Rate  %

Set Up Alerts

Max. Balance  Min. Balance

Contact Name  Phone

Home page  Bank Web page

Activity page  Activity Web page

Other page  Other Web page

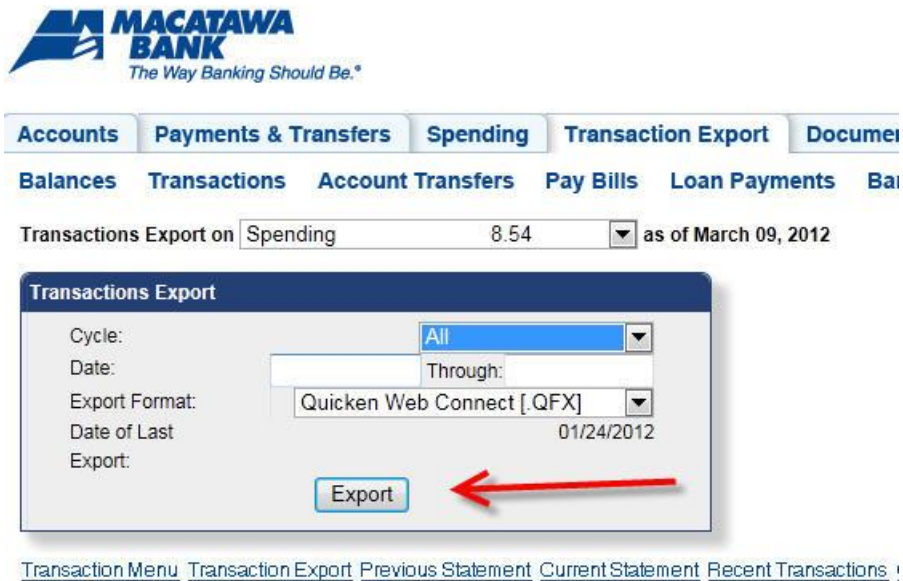
Comments

## Activate Web Connect

1. Log into Macatawa Bank's website from an external browser to initiate a download of a Web Connect file into Quicken (.QFX) as outlined in the following illustrations.

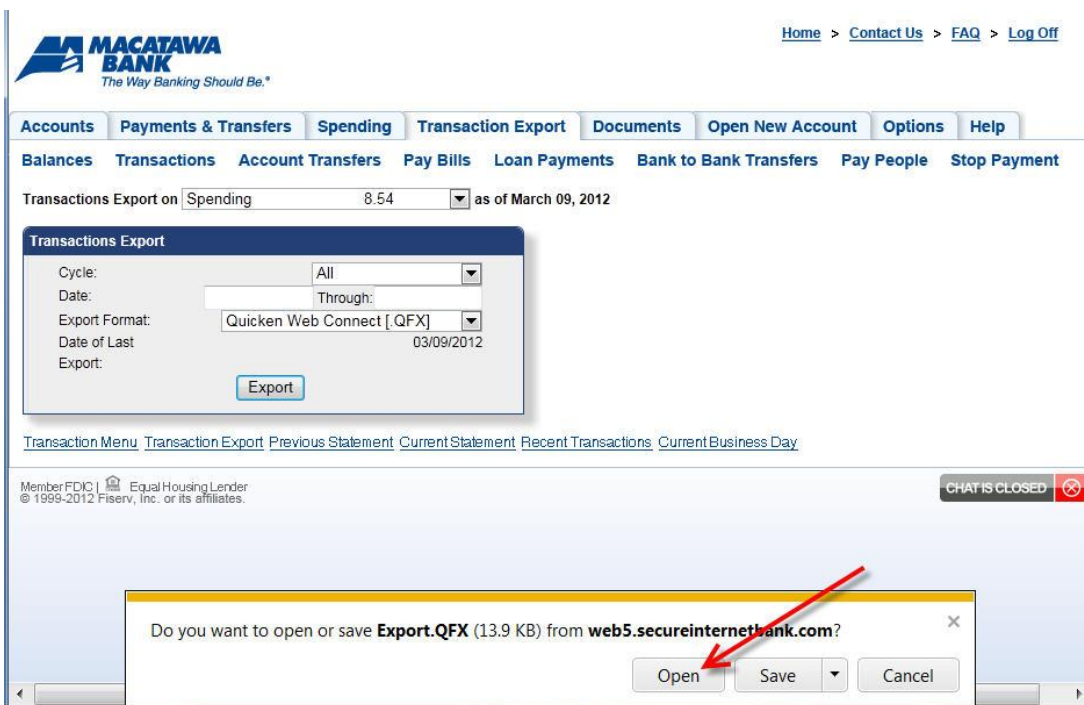


2. Select the transactions to export.



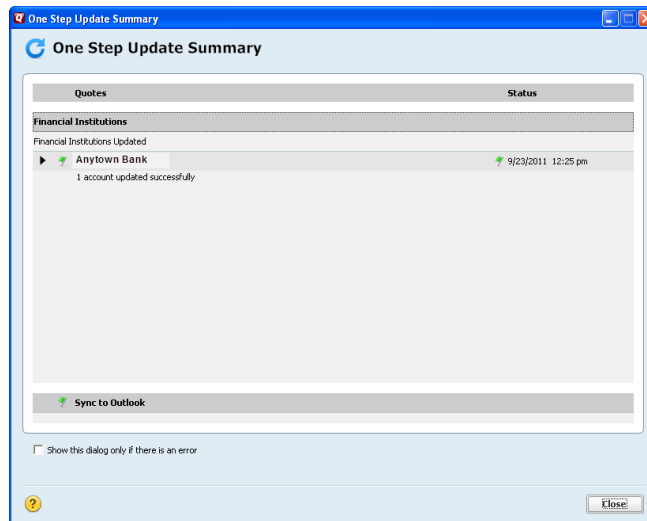
The image shows the Macatawa Bank website's Transaction Export interface. At the top is the Macatawa Bank logo with the tagline "The Way Banking Should Be.®". Below the logo is a navigation bar with tabs: Accounts, Payments & Transfers, Spending, Transaction Export, and Documents. Under the Transaction Export tab, there are sub-tabs: Balances, Transactions, Account Transfers, Pay Bills, Loan Payments, and Bal. The main content area shows "Transactions Export on" a dropdown menu set to "Spending", a balance of "8.54", and a date of "as of March 09, 2012". Below this is a "Transactions Export" form with fields for Cycle (All), Date, Through, Export Format (Quicken Web Connect [.QFX]), Date of Last Export (01/24/2012), and an Export button. A red arrow points to the Export button. At the bottom, there are links: Transaction Menu, Transaction Export, Previous Statement, Current Statement, and Recent Transactions.

3. Open the QFX file that has been downloaded.



The image shows the Macatawa Bank website's Transaction Export interface, similar to the previous one, but with a file download dialog box open. The dialog box asks "Do you want to open or save **Export.QFX** (13.9 KB) from **web5.secureinternetbank.com**?" and has buttons for Open, Save, and Cancel. A red arrow points to the Open button. The background shows the same Transaction Export form, but the Date of Last Export is now 03/09/2012. The navigation bar includes additional links: Home, Contact Us, FAQ, and Log Off. The footer includes "Member FDIC", "Equal Housing Lender", and "© 1999-2012 Fiserv, Inc. or its affiliates." A "CHAT IS CLOSED" button is also visible.

4. The One Step Update Summary screen will appear, confirming the account updated successfully.



5. Complete steps 1 thru 3 to reactivate each account for online banking.



NOTE: Now the account will be connected via Web Connect. Quicken may prompt to activate One Step Update after a successful Web Connect download. Please select No do not activate and check the box to not be prompted again.

