Quicken for Windows Conversion Instructions

Express Web Connect to Direct Connect

Introduction

As *Equity Bank* completes its online banking upgrade, 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 User ID and Password for each Financial Institution.

> **NOTE:** **Express Web Connect** uses the same User ID and Password as the *Equity Bank* website. **Direct Connect** for *Equity Bank* may require registration. Please contact your financial institution 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: 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 *Equity Bank* for a final download before *January 22, 2019*

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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 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.

Task 3: Disconnect Accounts At *Equity Bank* on or after *January 22, 2019*

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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 4: Reconnect Accounts to *Equity Bank USA* on or after *January 23, 2019*

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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 *Equity Bank* 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**.