

# Quicken for Windows Conversion Instructions

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*Quicken for Windows 2012–2015*

*Web Connect to Express Web Connect*

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## Introduction

As American Federal Bank completes its system conversion to a new online banking system, 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 ID and Password for the American Federal Bank online banking website.

**NOTE:** For Quicken Web Connect/Express Web Connect accounts, use the same User ID and PIN/Password as your financial institution website.

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 **05/12/2015**

## Documentation and Procedures

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### Task 1: Conversion Preparation

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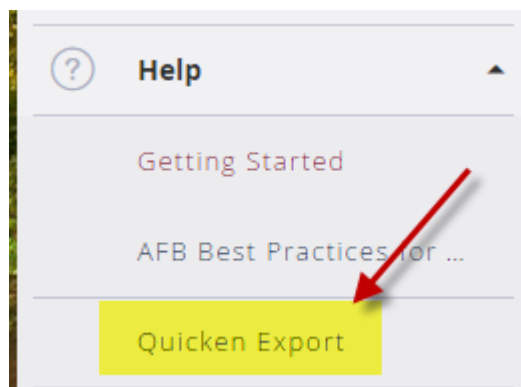
1. Backup your data file. For instructions to back up your data file, choose **Help > Search**. Search for **Backing Up Your Data** and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help > Search**. Search for **Update Software** and follow the instructions.

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### Task 2: Connect to American Federal Bank

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1. Log in to American Federal Bank's online banking website and download your Quicken export file. To create the Quicken export file, follow the Quicken Export instructions located in the Help menu



2. Click **File > File Import > Web Connect File**.

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.

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### Task 3: **Deactivate Your Account(s) At American Federal Bank**

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1. Choose **Tools > 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 2–6 for each account at American Federal Bank.

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### Task 4: **Re-activate Your Account(s) at American Federal Bank**

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1. Choose **Tools > 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 American Federal Bank and click **Next**.
7. On the Select Connection Method screen, select **Express Web Connect**.
8. Type your **User ID** and **Password**. Click **Connect**.

**NOTE:** You may be presented with a security question from your Financial Institutions prior to receiving your accounts.

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**. 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 account(s) have been added.

11. Click **Done** or **Finish**.

*Thank you for making these important changes!*