Online Banking Web Connect to Direct Connect Conversion
Quicken Windows 2008 -2010

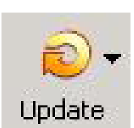
As your financial institution completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your customer ID and PIN.

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 15–30 minutes.

BACK UP YOUR CURRENT DATA

1. Choose File menu Backup.
2. Specify which file to back up and where you want the backup saved in the Quicken Backup dialog, and then click OK.

DOWNLOAD THE LATEST QUICKEN UPDATE



1. Click the Update icon on the Quicken toolbar.
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 Quicken. Reopen Quicken.

GET YOU LATEST TRANSACTIONS

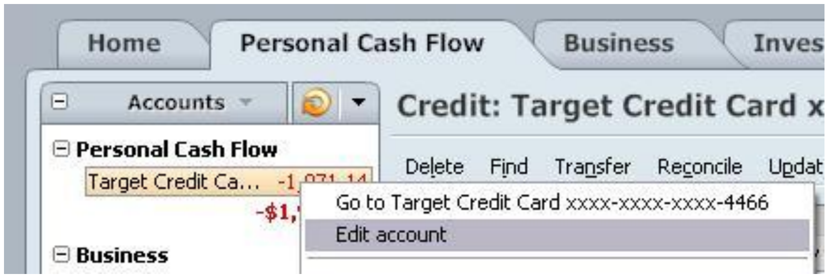
1. Log in to your financial institution's Web site, if available. Download your transactions into Quicken.
2. Once the transactions are downloaded, accept all the transactions into your Quicken account register.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) 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 YOUR ACCOUNT FROM WEB CONNECT

1. Right click the account in the Quicken Account List
2. Select Edit Account from pop-up.



3. Click the Online Services tab → click the Remove Connection button
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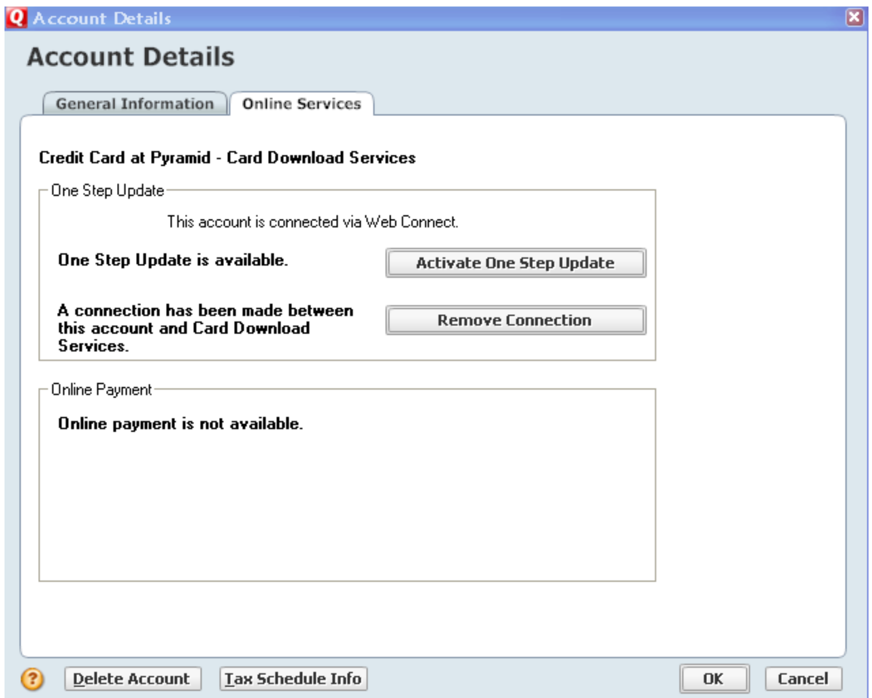


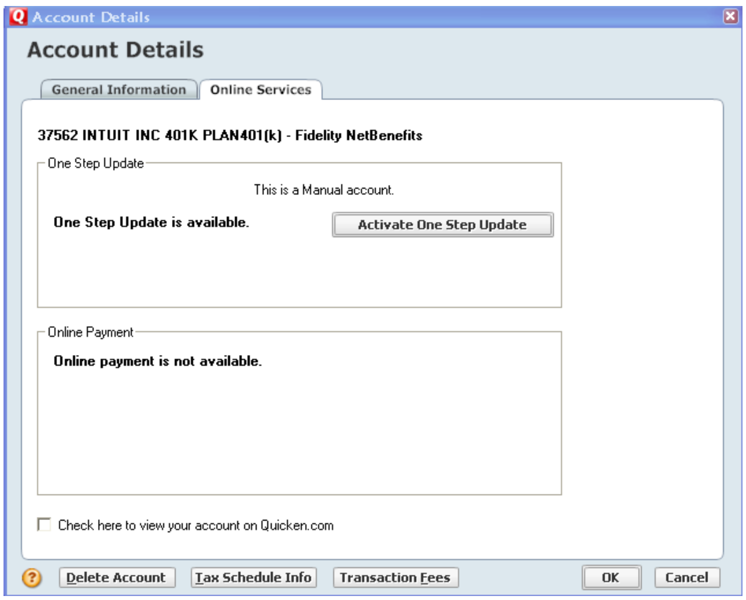
4. Quicken will prompt you to confirm deactivation → click Yes → click ok

ACTIVATE YOUR ACCOUNT(S) FOR DIRECT CONNECT

1. Right-click your account from the Quicken Account List → select Edit account from the pop-

up.

2. Click the Online Services tab. In the One Step Update section, it will state the connection method is a Manual account → click Activate One Step Update

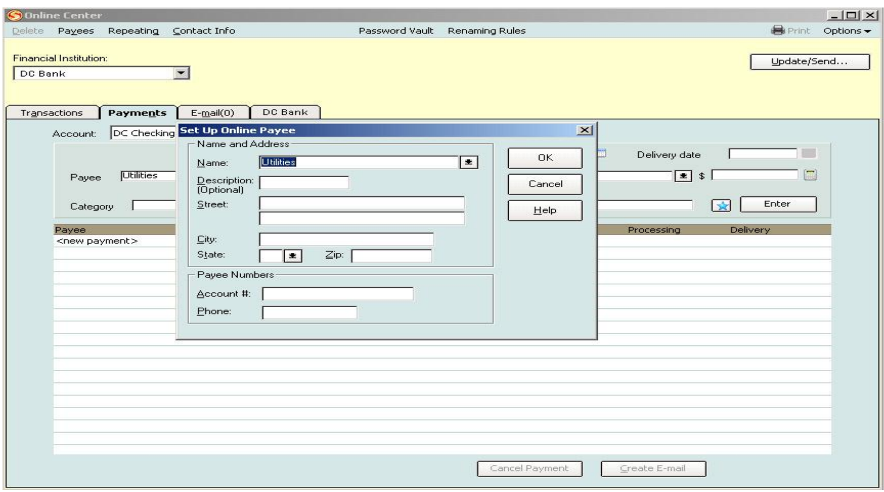


3. Follow the Account Setup to activate your account for online banking.

USING ONLINE BILL PAY

If you are not a bill pay customer or if your financial institution does not support bill pay within Quicken, you can skip this section

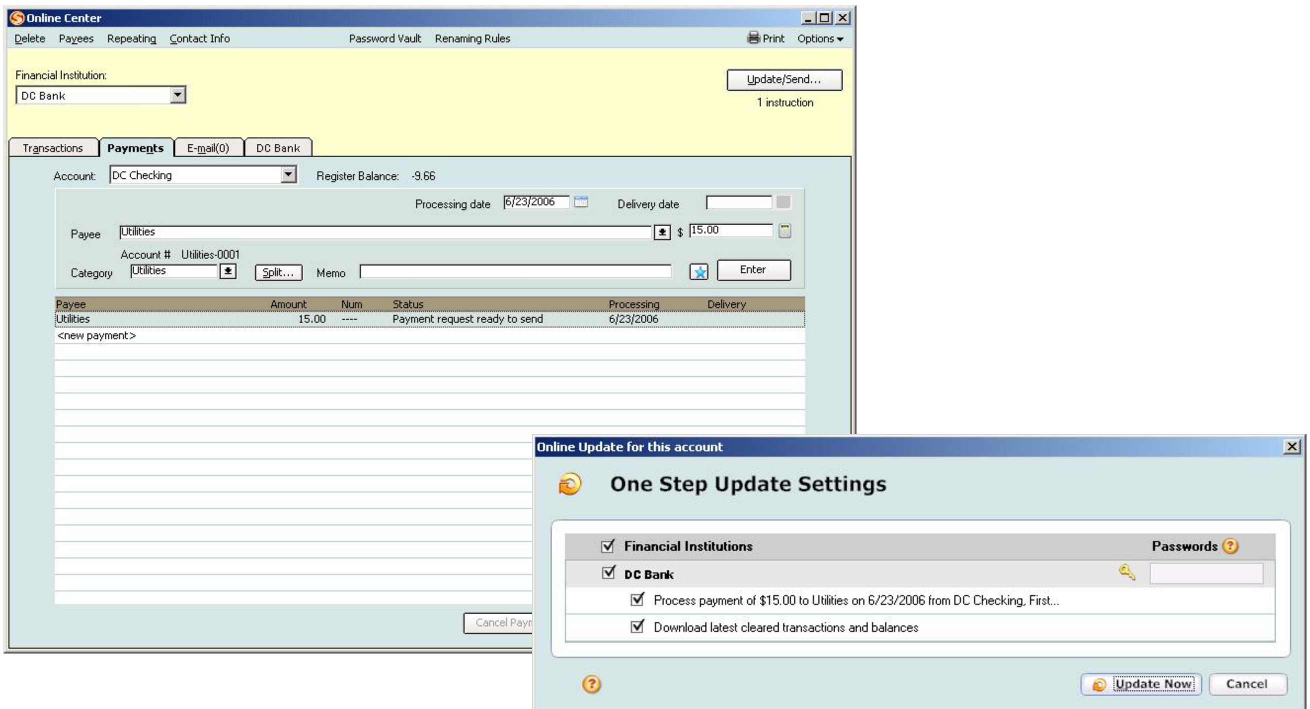
1. Choose Tools → Online Center (2010) or Online menu → Online Center (2009-2008).
2. Choose your financial institution from the drop-down list.
3. Select the Payments tab → type your payee's name in the Payee field → press the TAB key.
4. In the Set Up Online Payee window, enter your payee's contact and account information. Click OK.
5. Review the information on the Confirm Online Payee Information screen → click Accept to continue (if you need to edit the information, click Cancel and make the necessary changes).



6. Create an Online Payment.
7. Fill in the remaining fields for the payment that you wish to make (payment amount, processing or delivery date, category, and memo). Click Enter.
8. Click Update/Send.

Note: Bank of Internet supports processing dates, which means that funds are withdrawn from your account on the date that your payment is processed. It may take a couple of extra day for your payee to receive this payment, so you should build these days into your payment date.

Note: Bank of Internet supports delivery dates, which means that funds are withdrawn on the date that you schedule your payee to receive payment.



Thank you for making these important changes!