Quicken Web Connect Conversion Guide

As we complete our technology conversion, you will need to modify your Quicken settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for both Windows and Mac

Quicken Windows Web Connect

On Friday, June 11 prior to 6 p.m. CT:

1. Backup Quicken Windows Data File and Update.
   a. Choose **File** > **Backup and Restore** > **Backup Quicken File**.
   b. Download the latest Quicken Update. Choose **Help** > **Check for Updates**.
2. Complete a final transaction download.
   a. Complete a final transaction update to get all of your transaction history up-to-date.
   b. Repeat this step for each account you need to update.
   c. Accept all new transactions into the appropriate registers.

On Monday, June 14 after 8:00 a.m. CT:

1. Deactivate online banking connection for your INTRUST Bank account(s).
   a. Choose **Tools** > **Account List**.
   b. Click **Edit** on the account to deactivate.
   c. In Account Details, click **Online Services**.
   d. Click **Deactivate**. Follow prompts to confirm deactivation.
   e. Click the **General** tab.
   f. Delete Financial Institution and Account Number information.
   g. Click **OK** to close window.
   h. Repeat steps for any additional accounts.

2. Reconnect online banking connection for accounts that apply.
   a. Download a Quicken Web Connect file from INTRUST Personal Online Banking.
   b. In Quicken, choose **File** > **File Import** > **Web Connect (.QFX) File**.
   c. Use the import dialog to select the Web Connect file you downloaded. An “Import Downloaded Transactions” window opens.
   d. Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
   e. Repeat this step for each account(s) you have connected to INTRUST Bank.

Quicken Mac Web Connect

On Friday, June 11 prior to 6 p.m. CT:

1. Backup your Quicken Mac data file and update the application.
    a. Choose **File** > **Save a Backup**.
    b. Download the latest Quicken Update. Choose **Quicken** > **Check for Updates**.
2. Complete a final transaction download.
    a. Complete a final transaction update to get all of your transaction history up-to-date.
    b. Repeat this step for each account you need to update.
    c. Accept all new transactions into the appropriate registers.

On Monday, June 14 after 8:00 a.m. CT:

Activate online banking connection for your INTRUST Bank account(s).

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** > **Settings**.
3. Select **Set up transaction download**.
4. Enter “INTRUST Bank” in the search field, select the correct option and click **Continue**.
5. Log into Personal Online Banking and download your transactions to your computer.
    a. **Important**: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.
6. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web Connect** for the “Connection Type” if prompted
7. On the Accounts Found screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, click **Link** to pick your existing account.
    a. **Important**: Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken.
8. Click **Finish**.