Quicken Conversion Instructions

As we complete your move to a new business online and mobile banking platform, 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 connectivity types (Express Web Connect and Web Connect).

To navigate this document, just click the link below that matches your product and connectivity:

- **Express Web Connect**

  **If you've entered your online banking login information into Quicken for automatic downloading of your transactions.*

  - Quicken Windows Express Web Connect
  - Quicken Connect (Mac)

- **Web Connect**

  **If you manually download a transaction file from online banking, and import the file into Quicken.*

  - Quicken Windows Web Connect
  - Quicken Mac Web Connect

INTRUST Bank®

Quicken Windows Express Web Connect

Before Friday, May 2 at 6:00 p.m. CT

1. Backup your Quicken Windows data file. Go to **File** > **Backup and Restore** > **Backup Quicken File**.
2. Download the latest Quicken update. Go to **Help** > **Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

On Monday, May 5 after 9:00 a.m. CT

1. Deactivate online banking connection for INTRUST Bank.
    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. Click **OK** to close window.
    g. Repeat steps for any additional accounts that apply.
2. Reconnect online banking connection for accounts that you deactivated.
    a. Choose **Tools** > **Account List**.
    b. Click **Edit** on the account you want to activate.
    c. In Account Details, click **Online Services** and then choose **Set up Now**.
    d. Type and select **INTRUST Bank Personal** in the search field and click **Next**.
    e. Enter your INTRUST online banking login credentials and click **Continue**.
        i. Important: If your credentials do not work, contact INTRUST Bank.
    f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu.
        i. **Important: Do NOT choose "Create a new account" unless you intend to add a new account to Quicken.** If you are presented with accounts you do not want to track in this data file, choose **Ignore – Don't Download into Quicken** or **Cancel**.
    g. After all accounts have been matched, click **Next** and then **Done**.

Quicken Connect (Mac)

Before Friday, May 2 at 6:00 p.m. CT

1. Backup your Quicken Connect data file and update the connection.
    a. Choose **File** > **Backup**.
    b. Download the latest Quicken update. Choose **Quicken** > **Check for Updates**.
2. Complete a final transaction download.
    a. Complete last transaction update *before* the change to get all your transaction history up to date.
    b. Accept all new transactions into the appropriate registers.

On Monday, May 5 after 9:00 a.m. CT

1. Active the online banking connection for accounts connected to INTRUST Bank.
    a. Click your account in the Accounts list on the left side.
    b. Choose **Accounts** > **Settings**.
    c. Select **Set up transaction download**.
    d. Type and select **INTRUST Bank Personal** in the search field and click **Next**.
    e. Enter your INTRUST online banking login credentials and click **Continue**.
        i. Important: If your credentials do not work, contact INTRUST Bank.
    f. In the “Accounts Found” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under **Action**, choose **Link** to pick your existing account.
        i. **Important: Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken.**
    g. Click **Finish**.

Quicken Windows Web Connect

Before Friday, May 2 at 6:00 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 last transaction update *before* the change to get all 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, May 5 after 9:00 a.m. CT

1. Deactivate online banking connection for accounts connected to INTRUST Bank.
    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 online banking.
        i. In online banking, select the account you want to download transactions.
        ii. At the top of the transactions list, select the download icon (next to the print icon).
        iii. Select the date range, and then for file type select "Quicken."
    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 you have connected to this institution.

Quicken Mac Web Connect

Before Friday, May 2 at 6:00 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 last transaction update *before* the change to get all 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, May 5 after 9:00 a.m. CT

1. Activate online banking connections for accounts connected to INTRUST Bank.
   a. Select your account under the Accounts list on the left side.
   b. Choose **Accounts** > **Settings**.
   c. Select **Set up transaction download**.
   d. Type and select **INTRUST Bank Personal** in the search field and click **Continue**.
   e. Log into INTRUST online banking and download your transactions.
      i. In online banking, select the account you want to download transactions.
      ii. At the top of the transactions list, select the download icon (next to the print icon).
      iii. Select the date range, and then for file type select "Quicken."

   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.
   f. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web Connect** for the "Connection Type" if prompted.
   g. In 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.
      i. **Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.**
   h. Click **Finish**.