Quicken for Windows Conversion Instructions

Quicken for Windows 2013-2015

Express Web Connect

Introduction

As ***Eclipse Bank*** completes its system conversion to you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your ***Access ID and Password*** for your ***Eclipse Bank*** Online Banking login.

NOTE:	Quicken Web Connect/Express Web Connect accounts use the same User ID and PIN/Password as ***Eclipse Bank*** 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.

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.

NOTE:	If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

Task 2: Deactivate Your Account(s) at ***Eclipse Bank***

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 2—6 for each account at ***Eclipse Bank***.

Task 3: Re-activate Your Account(s) at ***Eclipse Bank***

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 ***Eclipse Bank*** and click **Next**.
7. On the Select Connection Method screen, select **Express Web Connect**.
8. Type your **Access 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!