

Online Banking Web Connect Conversion Quicken Windows 2012

As Canandaigua National Bank & Trust completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your Login ID and Password.

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 15–20 minutes.

1 This update is time sensitive and can be completed on or after 11/8/11.

Back Up Your Current Data

- **1.** Choose File menu \rightarrow Backup and Restore \rightarrow Back up Quicken file.
- **2.** Specify where to back up your Quicken file \rightarrow click Back up Now.





Download the Latest Quicken Update

- **1.** Click on the Tools menu and select One Step Update (If the Password Vault prompt appears, click Cancel).
- **2.** Uncheck all boxes \rightarrow 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 and reopen Quicken.

Deactivate Web Connect

1. Click on the Tools menu \rightarrow select Account List. Highlight the account you want to deactivate \rightarrow click on the Edit button.

Q	Account List				
	Account List				
	Banking Investments		Account Name Spending		Transaction Download 🧿
	All Accounts	order	Mortgage Checking D	Edit	Yes (Improve Connection)
			Money Market Account	Edit	Yes (Direct Connect)
			Cash Account	Edit	

2. Click the Online Services tab \rightarrow click Deactivate.

ccou	nt Details		
Genera	al Online Services Display O	ptions	
Online S	5etup Checking is set up for transaction download. Au	utomatic entry is: On	Deactivate
Financia Connec	al Institution: Anytown Bank tion Method: Web Connect Your Financial Institution supports a Click here to find out more and gets	n improved connection method.	
Online E	Bill Payment		
.	Pay your bills online without leaving Quicken.	Set up	now



- **3.** Quicken will prompt you to confirm deactivation \rightarrow click Yes.
- **4.** If Automatic entry is On, click on the link and select No Never automatically add transactions for this account. Click OK.
- 5. Select the General tab and remove Canandaigua National Bank & Trust and Account Number as shown below → click OK to save changes.

🛛 Account Details			×
Account Details			
General Online Services Display Option	15		
Account Name Chec. Delete the Fl	Name **ution	Anytown Bank	
Description and Account	Number mber	123456789	
Account Type: Checking			
Tax-Deferred <u>Y</u> es • No	<u>⊂</u> ontact Name		
Interest <u>R</u> ate %	Phone		
Set Up Alerts	Home page	Bank Web page	Go
Max. Balance	Activity page	Activity Web page	Go
Min. Balance	Other page	Other Web page	Go
	Comment <u>s</u>		
? Delete Account Tax Schedule		OK	Cancel

Activate Web Connect

1. Log into CNB's website from an external browser to initiate a download of a Web Connect file into Quicken (.QFX). When presented with the screen below, choose the "Link to an existing account" radio button and select the appropriate account from the menu. Click Import.

1	🛿 Import Downloaded	Transactions	×		
	Import Downloaded Transactions				
Anytown Bank Checking - 123456789					
	C Create a new accoun	t Checking at Anytown Bank Nickname	Personal Vised mostly for		
1	• Link to an existing acc	Checking			
	? Cancel		Import		



- **2.** The One Step Update Summary screen will appear, confirming the account updated successfully.
- 3. Complete steps 1 and 2 to reactivate each account for online banking.

ne Step Update Summary	
🗲 One Step Update Summary	
Quotes	Status
inancial Institutions	
Financial Institutions Updated	
🕨 🖌 Anytown Bank	✓ 9/29/2011 10:53 am
1 account updated successfully	
Sync to Autlank	
Show this dialog only if there is an error	
	Close

NOTE: Now the account will be connected via Web Connect. Quicken may prompt to activate One Step Update after a successful Web Connect download. Please select No do not activate and check the box to not be prompted again.



Congratulations, you have completed the necessary changes!