

# Quicken for Windows Conversion Instructions



*Quicken for Windows 2013–2016*

*Web Connect*

## Introduction

As your bank completes its system upgrade, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your [User ID and Password](#) for the eBanking 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

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### **Task 1:** Conversion Preparation

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1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for *Backing Up Your Data* and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for *Update Software* and follow the instructions.

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### **Task 2:** Deactivate Accounts at *County National Bank-Erie Bank BIB* on or after **May 23, 2016**

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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 for each account you wish to deactivate.

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**Task 3:** Reactivate Accounts at **CNB Bank/ERIEBANK/FCBank** on or after **May 23, 2016**

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1. Download your Quicken Web Connect file from **CNB Bank/ERIEBANK/FCBank**.

**IMPORTANT:** Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

2. Click **File > File Import > Web Connect File**. Locate and select the Web Connect file to import.
3. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

**IMPORTANT:** Do **NOT** select **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, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.

4. Repeat steps for each account you wish to reactivate in Quicken.

*Thank you for making these important changes!*

# Quicken for Mac

## Conversion Instructions

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*Quicken for Mac 2015-2016*

*Web Connect*

### Introduction

As your bank completes its system upgrade, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your [User ID and Password](#) for the eBanking 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

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#### **Task 1:** Conversion Preparation

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1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up**, select **Backing up data files**, and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates**, select “Check for Updates,” and follow the instructions.

#### **Task 2:** Deactivate Your Account(s) **County National Bank-Erie Bank BIB** on or after **May 23, 2016**

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8. Select your account under the **Accounts** list on the left side.
9. Choose **Accounts** menu > **Settings**.
10. Select **Troubleshooting** > **Deactivate Downloads**.
11. Repeat steps for each account.

#### **Task 3:** Reactivate Your Account(s) at **CNB Bank/ERIEBANK/FCBank** on or after **May 23<sup>th</sup>, 2016**

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1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Settings**.
3. Select Set up transaction download.
4. Enter **CNB Bank/ERIEBANK/FCBank** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Log in to **CNB Bank/ERIEBANK/FCBank**. **Download** a file of your transactions to your computer.
6. 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.
7. Drag and drop the downloaded file into the box **Drop download file**.

**NOTE:** Select “Web Connect” for the “Connection Type” if prompted.

8. In the “**Accounts Found**” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select “**Link**” to pick your existing account.

**IMPORTANT:** Do **NOT** select “**ADD**” under the action column unless you intend to add a new account to Quicken.

9. Click **Finish**.
10. Repeat steps for each account you are reactivating in Quicken.

*Thank you for making these important changes!*