

To enhance your Intuit connection, you will need to modify your Quicken settings to ensure the smooth transition of your data. It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your Online Banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

## Documentation and Procedures

### Task 1: Disconnect Accounts

After you sign into your Quicken account you must disable your account(s) from any online connection prior to using Direct Connect:

1. Select the **Tools** menu and select **Account List**. The Account List window opens.
2. Select the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog box, select the **Online Services** tab.
4. Select **Deactivate**. Follow the prompts to confirm the deactivation.
5. Select the **General** tab.
6. Remove the financial institution name and account number. Select **OK** to close the window.
7. Repeat steps for each account to be disconnected.

### Task 2: Reconnect accounts to Independent Financial

1. Download your Quicken Express Web Connect file from Independent Financial by logging into online banking. Go to **Account Details** for the account you are working with and click on the download icon in the upper right hand side of the page.
1. 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. Select **File > File Import > Express 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.
4. Repeat steps for each account to be reconnected.

**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.