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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: Update Register

If new transactions were received from your connection, accept all new transactions into the appropriate registers.

If you need assistance matching transactions, choose the Help menu and use the Search bar available at the top. Search for Updating Your Register, select the article with that name and follow the instructions.

> **IMPORTANT:** All transactions must be matched or added to the register prior to disconnecting your accounts.

Task 2: Disconnect Accounts (if applicable)

1. Choose **Lists** menu > **Chart of Accounts.**
2. Select the account you want to deactivate.
3. Choose **Edit menu** > **Edit Account**.
4. In the Edit Account window, select the **Online Settings** button.
5. In the **Online Account Information** window, choose **Not Enabled** from the **Download Transaction** list and click **Save**.
6. Click **OK** for any dialog boxes that may appear with the deactivation.
7. Repeat steps for each account to be disconnected.

Task 3: Reconnect Accounts

1. Visit **ifinancial.com**, log in to online banking and download your QuickBooks Express WebConnect File. You will find the download icon in the upper right hand corner of the **Account Details page** for the selected account.

   NOTE: 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.

2. Select **File** > **Import** > **From Express Web Connect**.

3. If prompted for connectivity type, select **Express Web Connect**.

4. The Account Association window displays during setup. For each account you wish to download into QuickBooks, click **Select an Account** to choose the appropriate existing account register.

   IMPORTANT: Do **NOT** select "**New**" under the action column.

5. Select **Continue**.

6. Select **OK** to any informational prompts.

7. Add or match all downloaded transactions in the **Downloaded Transactions** window.

8. Repeat steps for each account to be reconnected.