Quicken for Windows Conversion Instructions

Quicken for Windows

Express Web Connect

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Introduction

As ***Countryside Bank*** completes its system conversion to ***Hinsdale Bank & Trust Company, N.A.®,*** you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your login credentials for the ***Countryside Bank*** and ***Hinsdale Bank & Trust Company, N.A.*** websites.

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.

NOTE:	This update is time sensitive. Tasks 1-3 must be completed on or before Friday, April 17th. Task 4 can be completed on or after Monday, April 20th.

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.

Task 2: Deactivate Your Account(s) At Countryside Bank

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** or **Edit Details** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate** or **Remove from One Step Update**. Follow the prompts to confirm the deactivation.

NOTE:	The name of the buttons referenced above may vary depending on the services you currently use and the version of Quicken you are using.

5. Click on the **General** or **General Information** tab. Remove the **Account Number**.
6. Remove the name of the **Financial Institution**. Click **OK** to close the window.
7. Repeat steps 2—6 for each account at ***Countryside Bank***.

Task 3: Re-activate Your Account(s) at Hinsdale Bank & Trust Company, N.A. after Monday, April 20th

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 ***Hinsdale Bank & Trust Company, N.A.*** and click **Next**.
7. If presented with the Select Connection Method screen, select **Express Web Connect**.
8. Enter your **User 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** or **Exists in Quicken** and select the matching accounts in the drop-down menu.

IMPORTANT:	Do **NOT** select **New** or **Add In 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!