Quicken for Windows Conversion Instructions

Quicken for Windows

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 on or before Friday, April 17th.

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 ***Checking for Updates to Quicken*** and follow the instructions.

Task 2: Connect to Countryside Bank on or before Friday, April 17th.

3. Log in to ***Countryside Bank*** web site at www.bankcountryside.com. Download your Quicken Web Connect file.
4. In Quicken, click **File** > **File Import** > **Web Connect File**
5. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Deactivate Your Account(s) At Countryside Bank

1. In Quicken, 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 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 4: Re-activate Your Account(s) at Hinsdale Bank & Trust Company, N.A. on Monday, April 20th.

1. Log in to ***Hinsdale Bank & Trust Company, N.A.*** web site at www.hinsdalebank.com and download your Quicken Web Connect File.
2. In Quicken, click **File** > **File Import** > **Web Connect File**.
3. If prompted for connectivity type, select **Web Connect**.

IMPORTANT:	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.

4. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link** to an existing account or **Use an Existing** Quicken account and select the matching account in the drop-down menu.

IMPORTANT:	Do **NOT** select **Create a new account** or **Create a new Quicken account**. 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.

5. Repeat steps 2 – 4 for all of your accounts

Thank you for making these important changes!