Express Web Connect Conversion Instructions
Quicken Windows 2009-2011

Islanders Bank

As your financial institution completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your customer ID, PIN/Password and security questions.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online banking service may stop functioning properly. This conversion should take 15–20 minutes.

This update is time sensitive and can be completed on or after 08/18/2011.

NOTE: This guide provides instruction for multiple versions of Quicken Windows, please be sure you are following the proper steps according to the version on Quicken you are currently using.

Back Up Your Current Data

1. **(2009)** Choose File menu → Backup

(2010-2011) Choose File menu → Back up and Restore → Back up Quicken file

2. Specify which file to back up and where you want the backup saved.

3. Backup dialog → click OK

Download the Latest Quicken Update

1. **(2009)** Click on the Online menu and select One Step Update.

   (2010 & 2011) Click on the Tools menu and select One Step Update.
2. Click Cancel if presented with Password Vault dialog.
3. Uncheck all boxes → Update Now in the One Step Update Settings dialog.
4. If an update is available Quicken will provide a description of the update and brief instructions to install the update.
5. Once the update is complete, close Quicken and reopen Quicken.

Get Your Latest Transactions

1. Choose Online Menu → Online Center
2. Select your financial institution from the Financial Institution drop-down list.
3. Click the E-mail tab (if available), then view or print any e-mails, if necessary.
4. Click Update/Send
5. In the One Step Update Setting dialog, make sure all items are checked. Enter your password → click Update Now.
6. If new transactions display in the Online Update Summary window, accept them in your Quicken account register.

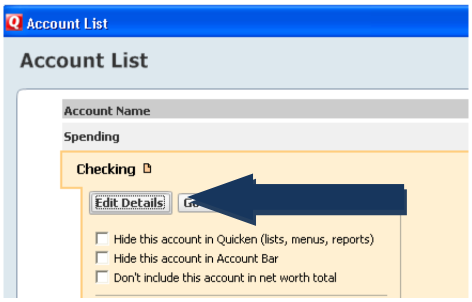
For assistance reconciling your account register, click on the Help menu → Quicken Help.

Deactivate Express Web Connect (One Step Update)

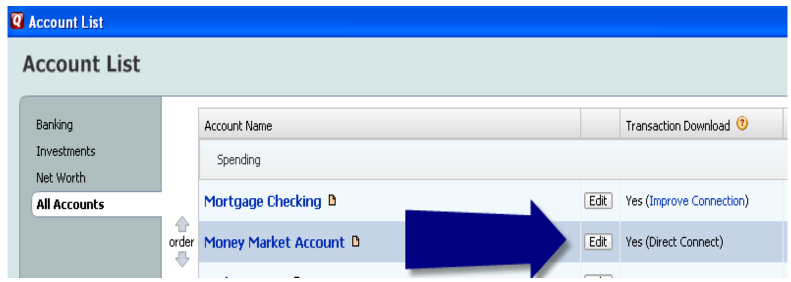
1. **(2009-2010)** Click on the Tools menu and select Account List. Highlight the account you want to deactivate → click no the Edit Details button.

   (2011) Click on the Tools menu and select Account List. Highlight the account you want to deactivate → click no the Edit button.

2009 & 2010



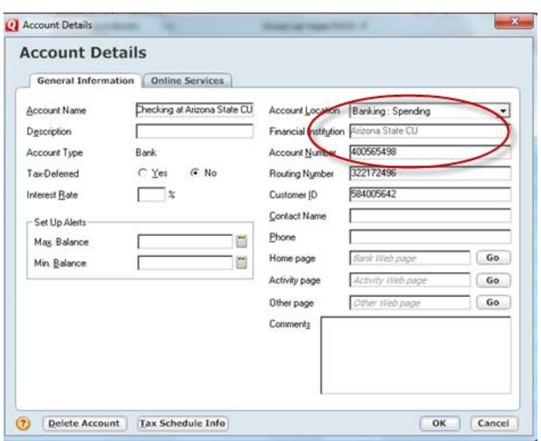
2011



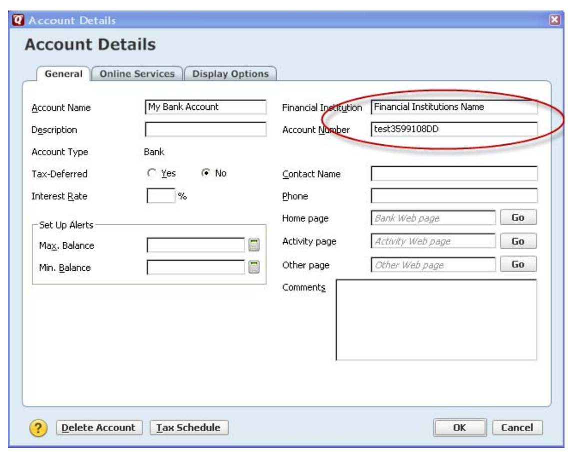
2. Click the Online Services tab. In the One Step Update section, it will state the connection method you are using. To disable the account → click "Remove from One Step Update".

3. Under the General tab, delete your Financial Institution Name and Account Number as shown below → click OK to save changes.

(2009-2010)



(2011)

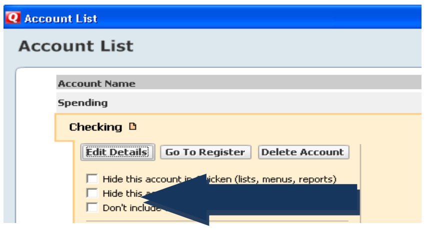


Reactivate Express Web Connect (One Step Update)

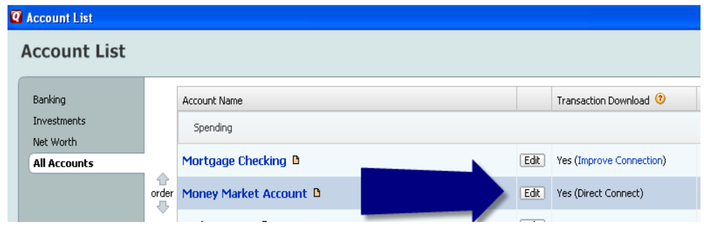
1. **(2009-2010)** Click on the Tools menu and select Account List. Highlight the account you want to reactivate → click on the Edit Details button.

   (2011) Click on the Tools menu and select Account List. Highlight the account you want to reactivate → click on the Edit button.

2009 & 2010



2011



2. Click the "Activate One Step Update" button and follow the onscreen prompts to complete the One Step Update activation process.

3. Quicken will recognize if transaction download is available. Select the Yes radio button → click Next.

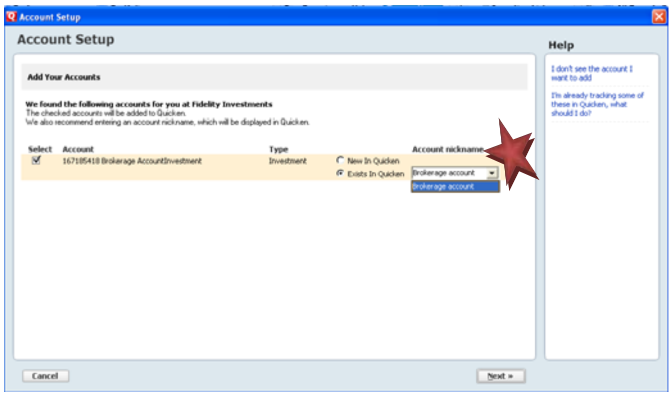
4. **(2009 & 2010)** Type your User ID and enter your password twice → click Next.

   (2011) Type your User ID and enter your password → click Connect.

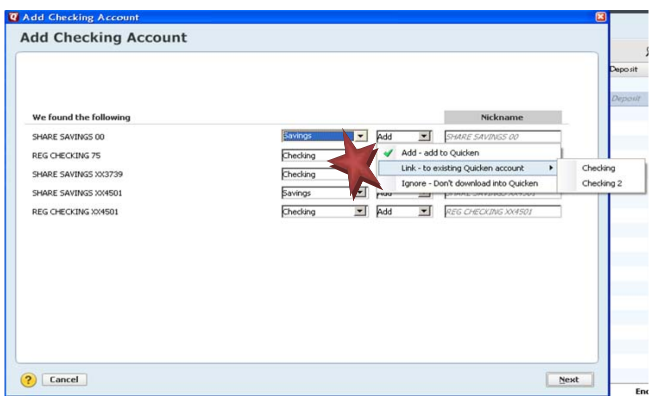
Follow the prompt to activate your accounts. You will be presented with a list of accounts available for online access. Ensure you associate the account to the appropriate account already listed in Quicken, by selecting "Exists in Quicken" and selecting the matching account in the drop down menu.

Do not select "New in Quicken" or "Add to Quicken".

(2009 & 2010)

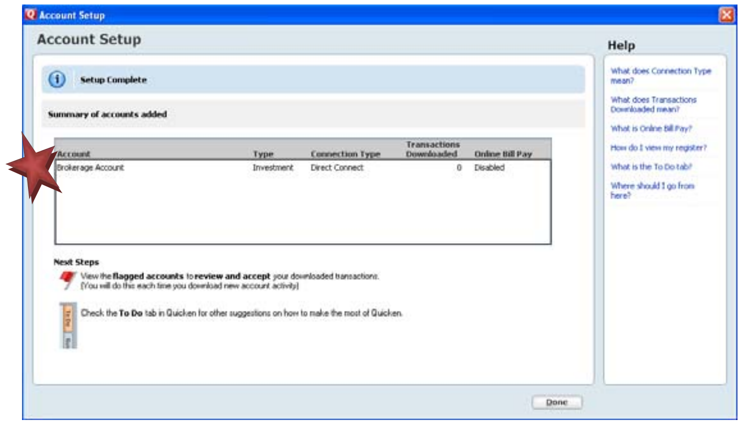


(2011)



If you are presented with accounts you do not want to track in this file, select Ignore Don't download into Quicken. After linking the accounts, click Next.

You will receive confirmation that your account(s) have been added. Click Done.



If you use the Password Vault, select Yes to store the Password in the Vault. Otherwise, select No → click Next. (You can always add the Password to the vault at a later time).

Congratulations, you have completed the necessary changes!