Quicken for Windows Conversion Instructions

Origin Bank

Quicken for Windows 2013–2015

Web Connect to Direct Connect

Introduction

As *Origin Bank* completes its system conversion*,* you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your *[User ID and Password]* for the *Origin Bank* website.

NOTE: Direct Connect may require registration. Please contact *Origin Bank* to verify your Direct Connect login information.

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.

Documentation and Procedures

Task 1: Conversion Preparation

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 *Update Software* and follow the instructions.

Task 2: Connect to *Origin Bank* for a final download before *2:00 pm on July 24, 2015*

1. Log in to *Origin Bank* and download your Quicken Web Connect file.

2. Click **File** > **File Import** > **Web Connect File**.

3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

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

NOTE: If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

Task 3: Deactivate Your Account(s) At *Origin Bank* on or after *July 24, 2015*

1. Choose **Tools** menu > **Account List**.

2. Click the **Edit** button of the account you want to deactivate.

3. In the **Account Details** dialog, click on the **Online Services** tab.

4. Click **Deactivate**. Follow the prompts to confirm the deactivation.

5. Click on the **General** tab.

6. Remove the financial institution name and account number. Click **OK** to close the window.

7. Repeat steps 2–6 for each account at *Origin Bank*.

Task 4: Re-activate Your Account(s) at *Origin Bank* on or after *July 27, 2015*

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 *Origin Bank* and click **Next**.

7. On the Select Connection Method screen, select **Direct Connect**.

8. Type your **User ID** and **Password** and click **Connect**.

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

> **IMPORTANT:** Do **NOT Add 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**.

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!