Quicken WebConnect Conversion Instructions

The following are instructions provided by Intuit (Quicken) to assist customers that have migrated to the new mobile and online banking platform, to (re)connect their BOH accounts. The steps below are to be actioned on, within the customer's Quicken WebConnect Platform.

Quicken Web Connect (PC/ Windows)

1. Deactivate online banking connection for accounts connected to financial institution that is requesting this change.
   a. Log into your **Quicken WebConnect** account
   b. Choose **Tools > Account List.**
   c. Click **Edit** on the account to deactivate.
   d. In Account Details, click **Online Services**.
   e. Click **Deactivate**. Follow prompts to confirm deactivation.
   f. Click the **General** tab.
   g. Delete Financial Institution and Account Number information.
   h. Click **OK** to close window.
   i. Repeat steps for any additional accounts.
1. Reconnect online banking connection for accounts that apply.
   a. Download a Quicken Web Connect file from your financial institution's online banking site.
   b. In Quicken, choose **File > File Import > Web Connect (.QFX) File.**
   c. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
   d. Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
   e. Repeat this step for each account you have connected to this institution.

Quicken Web Connect (Apple/ Mac)

Activate online banking connection for accounts connected to financial institution that is requesting this change.

1. Log into your **Quicken WebConnect** account
2. Select your account under the Accounts list on the left side.
3. Choose **Accounts > Settings.**
4. Select **Set up transaction download.**
5. Enter your financial institution name in the search field, select the correct option and click **Continue**.
6. Log into your financial institutions online banking site and download your transactions to your computer.
   a. **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.
7. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web Connect** for the "Connection Type" if prompted

8. In the “Accounts Found” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, click **Link** to pick your existing account.
    a. **Important: Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken.**
9. Click **Finish.**