

Quicken for Windows 2013-2016

Conversion Instructions for Direct Connect to Express Web Connect



As **Commonwealth Bank and Trust Company** completes its internet banking enhancements, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your **User ID** and **Password** for the Commonwealth Bank and Trust Company website.

NOTE: Quicken Web Connect/Express Web Connect accounts use the same User ID and PIN/Password as the Commonwealth Bank and Trust Company website.

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 between 15–30 minutes.



This detour symbol indicates a Task for Bill Pay in Quicken. If you do not use Quicken to make online bill payments, skip the Task.

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 COMMONWEALTH BANK AND TRUST

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog box, click on the **Online Services** tab.
4. Click on **Deactivate** or **Deactivate Online Payment** (only available if you use bill pay services). 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 Commonwealth Bank and Trust.
8. Backup your data file.

TASK 3: RE-ACTIVATE YOUR ACCOUNT(S) AT COMMONWEALTH BANK AND TRUST

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 **Commonwealth Bank and Trust** 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 Institution 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 to an Existing Account** and select the matching accounts in the drop-down menu.

IMPORTANT: Do NOT select **Add to Quicken** unless you intend to add a new account 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 accounts have been added.
11. Click **Done** or **Finish**.

*Thank you for making these important changes!
If you need assistance, please contact Electronic Banking at 502.259.2375.*