QUICKEN ® Express Web Connect- Windows

As Rollstone Bank & Trust completes our Online Banking conversion, your Quicken settings must be modified to ensure the smooth transition of your data.

This update is time sensitive and can be completed on or after **6/15/2015**.

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.

Step One: Backup your data file.

- For instructions to back up your date file, choose **Help** menu > **Quicken Help.** Search for ***Backup Data File*** and follow the instructions.
- Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Quicken Help**. Search for ***Update Software*** and follow the instructions.

Step Two: Deactivate your account(s) at RBT within Quicken®

- Choose **Tools** menu > **Account List.**
- Click the **Edit** button of the account you want to deactivate.
- In the **Account Details** dialog, click on the **Online Services** tab.
- Click **Deactivate.** Follow the prompts to confirm the deactivation.
- Click on the **General** tab.
- Remove Rollstone Bank & Trust name and account number. Click **OK** to close the window.
- Repeat deactivation steps for each account at RBT.

Step Three: Reactivate your account(s) at RBT.

- Choose **Tools** menu > **Account List.**
- Click the **Edit** button of the account you want to activate.
- In the Account Details dialog, click on the **Online Services tab.**
- Click **Set up Now.**
- Use **Advanced Setup** to activate your account.
- Enter Rollstone Bank & Trust and click **Next.**
- On the Select Connection Method screen, select **Express Web Connect.**
- Type your **User ID** and **Password.** Click **Connect.**

  You may be presented with a security questions from your Financial Institution prior to receiving your accounts.

- 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.** If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken.**

- After all accounts have been matched, click **Next.** You will receive confirmation that your account(s) have been added.
- Click **Done** or **Finish.**