QUICKEN ® 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 > **Search.** Search for ***Backing Up Your Data*** and follow the instructions.
- Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. 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.

- Log in to **Rollstone Bank & Trust** Online Banking web site and download your Quicken Web Connect file.
- Click **File > File Import > Web Connect File.**
- If prompted for connectivity type, select **Web Connect.**

Note: 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.

- 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 account in the drop-down menu.
- Repeat these steps for all of your accounts.

IMPORTANT: Do NOT select Create a new account. If you are presented with accounts you do not want to track in this date file, select Ignore – Don't Download into Quicken or click the Cancel button.