

Quicken: Windows Web Connect

WyHy Digital: Online & Mobile Banking



You should perform the following instructions exactly as described and in the order they are written. If you do not, your online banking connectivity may stop functioning properly. This conversion should take between 15 - 30 minutes.

Step 1: Backup & Download

- 1 Choose **File, Backup & Restore**, and then **Backup Quicken File**.
- 2 Download the latest Quicken Update by selecting **Help**, then **Check for Updates**.
- 3 Complete a last transaction update to ensure your transaction history is up to date. Repeat this step for each account you need to update. Accept all new transactions into the appropriate registers.

Step 2: Deactivate Accounts

- 1 Choose **Tools**, then select **Account List**. Click **Edit** on the account you want to deactivate.
- 2 In Account Details, click **Online Services**. Click **Deactivate** and follow the prompts to confirm deactivation.
- 3 **Click the General tab, then Delete Financial Institution and** Account Number information. Click **OK** to close the window. Repeat for any other accounts to deactivate.

Step 3: Reactivate Accounts

- 1 Download a Quicken Web Connect file from WyHy's online banking site at WyHy.org.
- 2 In Quicken, click **File, File Import**, and **Web Connect (.QFX) File**. Use the import dialog to select the file. *An Import Downloaded Transactions box will appear.*
- 3 Choose **Link to an Existing Account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account in Quicken. Repeat for addition accounts at WyHy.