Post-Conversion FAQs for Web Connect

Why do I have duplicate accounts after completing activation for Web Connect?

INFORMATION:
This will occur if the Add or Create New account is selected, when the Web Connect accounts are presented during activation. This could have happened if the account was not deactivated prior to activating for Web Connect. Only non-activated accounts will appear in this menu.

STEPS TO RESOLVE:

1. Look for bank accounts that are hidden (Quicken). If hidden accounts are found, change this status and deactivate the account. Steps to locate hidden/inactive accounts:
   - **Quicken for Windows 2011:** Tools > Account List > Place a check in **Show hidden accounts**
   - **Quicken for Windows 2009 & 2010:** Tools > Account List > Click on the Account Name and remove any check marks for hiding accounts
   - **Quicken Essentials for Mac 2010:** Highlight the account in the left column, click on the Settings icon and remove the check mark next to **Hide Account.**

2. **Quicken Connect only:** Duplicate transactions may occur due to the 5 day look back when downloading transactions. These transactions need to be manually deleted from the register. They can only be deleted one by one

   ➔ **Quicken for Windows 2010 & 2011 only:** Turn off the download preferences as shown below:

   1. Quicken 2011: Click on the Edit menu → select Preferences

      Quicken 2011: Click on the Edit menu → select Quicken Preferences

   2. Select Downloaded Transactions in left column

   3. Remove check from "Automatic Transaction Entry", if applicable

   4. Click OK.

3. **All Versions:** Deactivate the hidden/inactive accounts. After the accounts are deactivated, delete the duplicate account from the Account List. Complete steps to activate for Web Connect, making sure that "Use/Link existing account" is selected and linked to the correct account.

   - If the account is not in the drop down list after following these steps, there may be data issues. Please follow the steps for addressing data issues titled, **Why can't I deactivate my account?**

   - If the account is ***still not*** in the drop down list after following these steps for possible data issues, contact Member Services at the Torrington Municipal and Teachers FCU.

<u>Why can't I deactivate my account?</u>

INFORMATION:

This may be caused by data issues with the file. After following the steps in the FAQ, attempt to deactivate the account. Click on the product name to view the FAQ on the support site.

[Quicken for Windows]

[Quicken for Mac 2005-2007]

If the issue still persists, contact Member Services at the Torrington Municipal and Teachers FCU.

<u>I activated the incorrect account for Web Connect, how do I fix this?</u>

- If there are only one or two duplicate accounts, delete the duplicate account from the Account List. When reactivating for Web Connect, make sure the correct account is selected during account setup. **Note: Downloaded transactions must be accepted into the register before the account can be deleted.**

- If there are several duplicate accounts, the easiest solution is to restore the backup file. After restoring the backup file, make sure the correct account is selected during account setup.

<u>Why do I have duplicate transactions after activating for Web Connect?</u>

INFORMATION:

If you notice that your register is out of balance or you cannot reconcile the account without a balance adjustment, the likely cause is duplicate transactions in the register.

Depending on the number of duplicate transactions downloaded, the best solution may be to restore the backup file created earlier in the conversion process. If there are not many duplicate transactions, they can be deleted prior to, or after accepting them to the register.

STEPS TO RESOLVE:

<u>Quicken for Windows</u>

Note: *A preference in Quicken for Windows automatically enters the transactions into the register and may cause a balance adjustment during Reconcile.*

1. Quicken 2011: Click on the Edit menu → select Preferences

   Quicken 2011: Click on the Edit menu → select Quicken Preferences

2. Select Downloaded Transactions in left column
3. Remove check from "Automatic Transaction Entry", if applicable
4. Click OK.

Ensure this preference has been turned off, prior to following these steps:

- If the transactions have not been accepted to the register, they can be deleted one by one prior to accepting.
- If the transactions have already been accepted to the register, they can be deleted one by one, or **multiple transactions** can be deleted at one time. If there are too many transactions to delete, or the steps to delete multiple transactions is difficult; restore a backup file.

Quicken Essentials for Mac

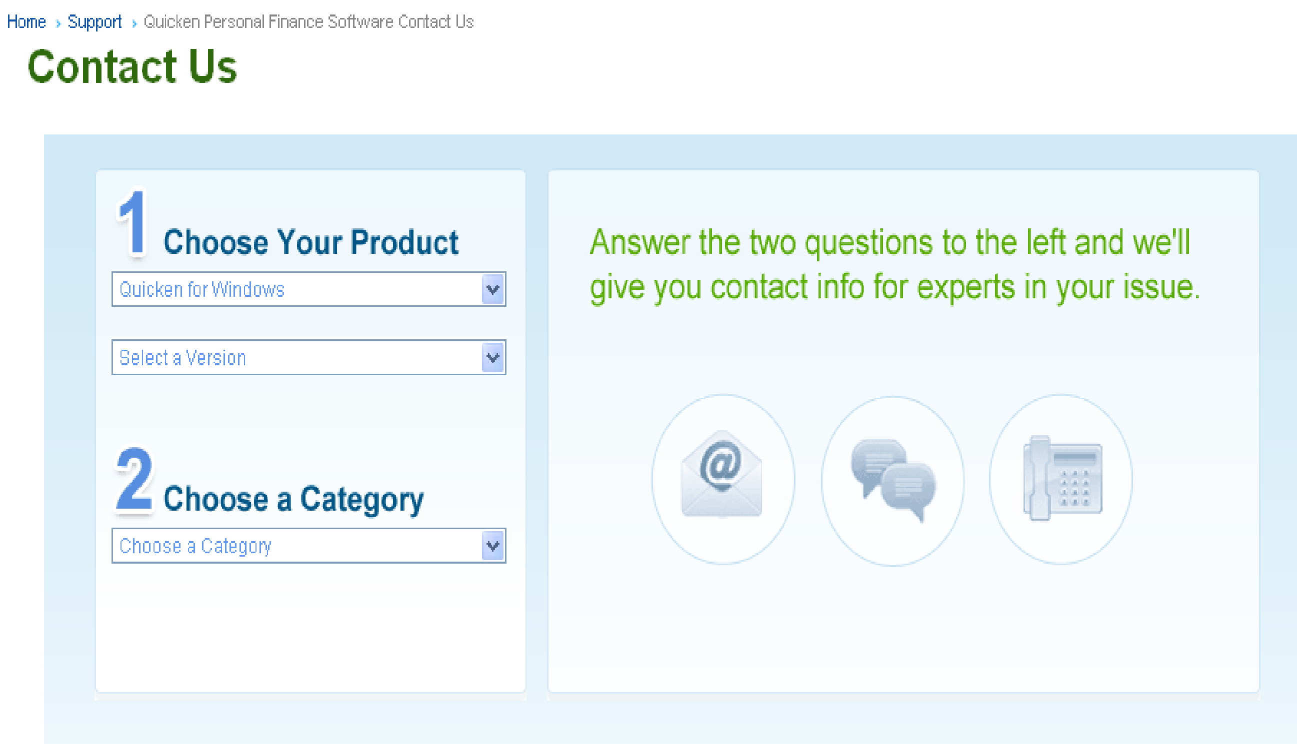
- If the transactions have not been accepted to the register, they can be deleted one by one or multiple transactions can be deleted at one time.
- If the transactions have already been accepted to the register, they can be deleted one by one from the register.
- If there are too many transactions to delete from the register, restore a backup file. Make sure you delete the transactions prior to accepting them into the register.

Quicken for Mac 2005-2007

- If the transactions have not been accepted to the register, they can be deleted one by one **prior to accepting** into the register.
- If the transactions have already been accepted to the register, they can be deleted one by one **from the register**.
- If there are too many transactions to delete from the register, restore a backup file. Make sure you delete the transactions prior to accepting them into the register.

Free support for Quicken Users is also available at:

https://quicken.custhelp.com/app/contact/plvl1/win



Follow the prompts to access Chat and Email, or obtain the Quicken support phone number.

EMAIL SUPPORT **(response in 2 business days)**

CHAT SUPPORT **(Chat support is available 24 hours a day, 7 days a week)**

PHONE SUPPORT **(Hours of operation are 5am-5pm, Monday through Friday PST)**