

Online Banking Web Connect Conversion Quicken Windows 2012



As the Torrington Municipal and Teachers FCU completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need to be able to login to Star Online and may use your existing User ID and password.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online banking service may stop functioning properly. This conversion should take 15–20 minutes.



This update is time sensitive and can be completed on or after November 3rd, 2011.

Back Up Your Current Data

1. Choose File menu → Backup and Restore → Back up Quicken file.
2. Specify where to back up your Quicken file → click Back up Now.

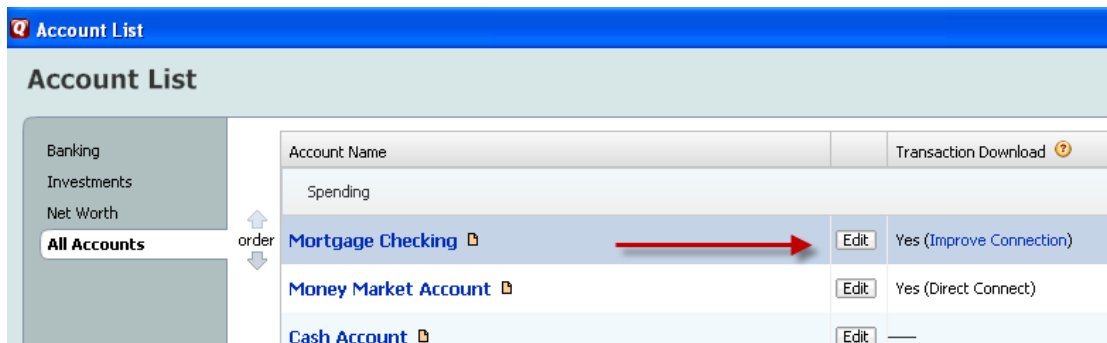


Download the Latest Quicken Update

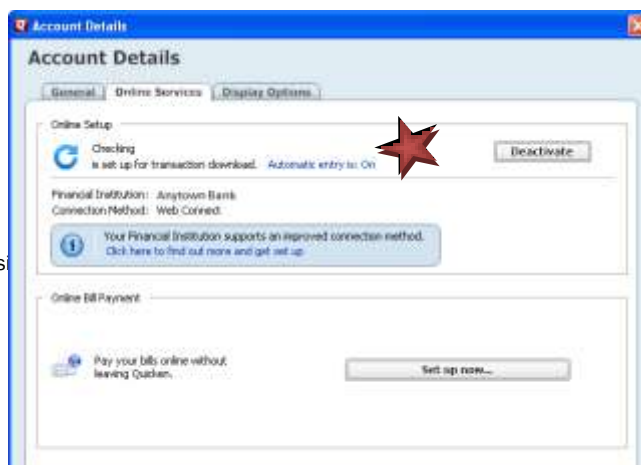
1. Click on the Tools menu and select One Step Update (If the Password Vault prompt appears, click Cancel).
2. Uncheck all boxes → Update Now in the One Step Update Settings dialog.
3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.
4. When the update is completed, close and reopen Quicken.

Deactivate Web Connect

1. Click on the Tools menu → select Account List. Highlight the account you want to deactivate → click on the Edit button.



2. Click the Online Services tab → click Deactivate.



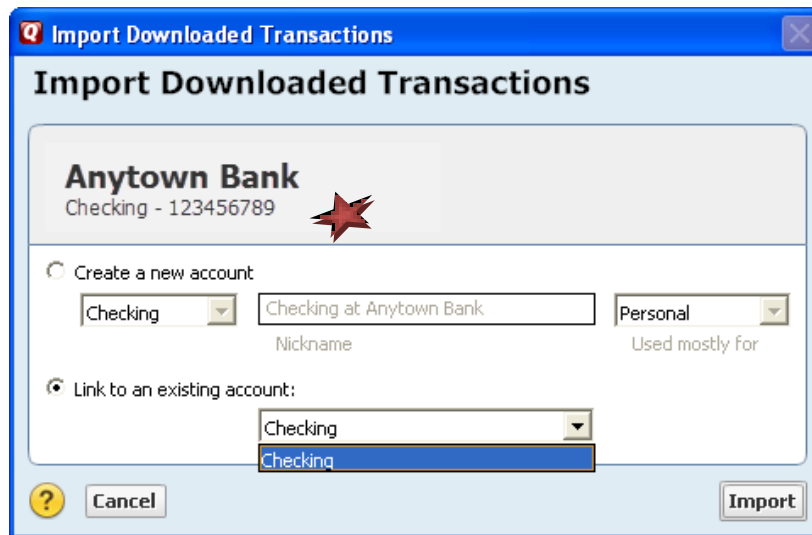
3. Quicken will prompt you to confirm deactivation → click Yes.
4. If Automatic entry is On, click on the link and select No - Never automatically add transactions for this account. Click OK.
5. Select the General tab and remove the Financial Institution Name and Account
6. Number as shown below → click OK to save changes.

The screenshot shows the 'Account Details' dialog box with the 'General' tab active. A blue arrow points to the 'Financial Institution' and 'Account Number' fields, with the text 'Delete the FI Name and Account Number' next to it. The 'Financial Institution' field contains 'Anytown Bank' and the 'Account Number' field contains '123456789'. Other fields include 'Account Name', 'Description', 'Account Type', 'Tax-Deferred', 'Interest Rate', 'Set Up Alerts', 'Contact Name', 'Phone', 'Home page', 'Activity page', 'Other page', and 'Comments'. Buttons for 'Delete Account', 'Tax Schedule', 'OK', and 'Cancel' are at the bottom.

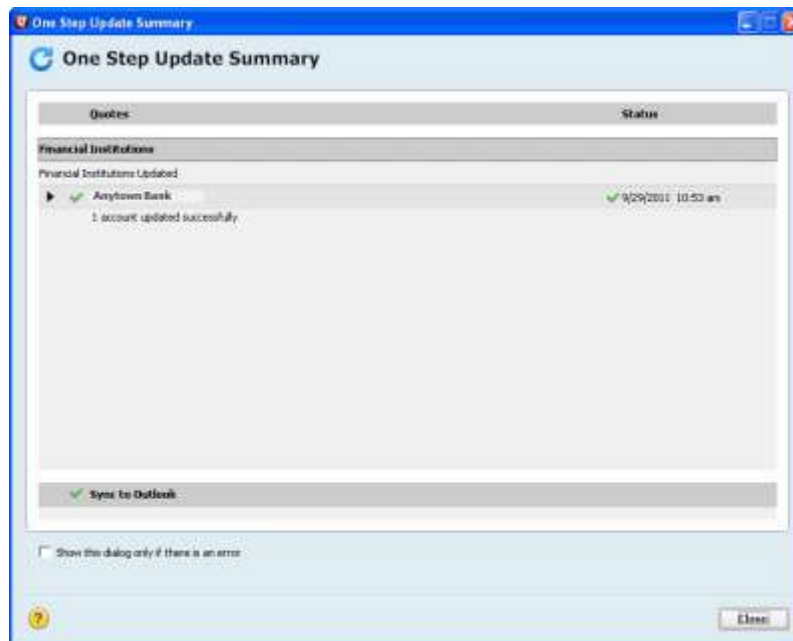
Activate Web Connect

1. Log into Star Online from an external browser to initiate a download of a Web Connect file into Quicken (.QFX). When presented with the screen below, choose

the "Link to an existing account" radio button and select the appropriate account from the menu. Click Import.



2. The One Step Update Summary screen will appear, confirming the account updated successfully.
3. Complete steps 1 and 2 to reactivate each account for online banking.



Congratulations, you have completed the necessary changes!