

# QUICKEN FOR WINDOWS CONVERSION GUIDE

A step-by-step tutorial for successfully modifying Quicken for a smooth transition.

## Introduction

As Horizon Bank completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your [User ID and Password] for the Horizon Bank website. **NOTE:** *Express Web Connect uses the same User ID and Password as your financial institution's website.*

It is important that you follow these instructions exactly as described and in the order presented or your online banking activity may stop functioning properly. This conversion should take about 15-30 minutes.

## Documentation & Procedures

### Task 1: Conversion Preparation

1. Back up your data file. For instructions to back up your data file, choose [Help](#) menu > [Quicken Help](#). Search for [Backup Data File](#) and follow the instructions on screen.
2. Download the latest Quicken Update. For instructions to download an update, choose [Help](#) menu > [Quicken Help](#). Search for [Update Software](#), and follow the instructions.

### Task 2: Disconnect Your Account(s) at Horizon Bank, SSB

1. Choose [Tools](#) menu > [Account List](#).
2. Click the [Edit](#) button of the account you want to deactivate.
3. In the [Account Details](#) dialog, click on the [Online Services](#) tab.
4. Click [Deactivate](#). Follow the prompts to confirm deactivation.
5. Click on the [General](#) tab.
6. Remove the financial institution name and account number. Click [OK](#) to close the window.
7. Repeat steps for each account you are disconnecting.

### Task 3: Reconnect Accounts to Horizon Bank, SSB

1. Choose [Tools](#) menu > [Account List](#).
2. Click the [Edit](#) button of the account you want to activate.
3. In the [Account Details](#) dialog, click the [Online Services](#) tab.

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4. Click **Set up now**.
5. Use **Advanced Setup** to activate your account.
6. Enter **Horizon Bank SSB** in the search field, select the name in the list and click **Next**.
7. If presented with the Select Connection Method screen, select **Express Web Connect**.
8. Enter your **User ID** and **Password**. Click **Connect**. **NOTE:** *You may be presented with a security question prior to receiving your accounts.*
9. 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. **NOTE:** *Do NOT choose "Add to Quicken" unless you want to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, choose "Ignore - Don't Download into Quicken".*
10. After all accounts have been matched, click **Next**. You will receive a confirmation that your accounts have been added.
11. Click **Done** or **Finish**.