

# RCB BANK

*That's my bank!*  
MEMBER FDIC

## Quicken for Windows Conversion Instructions

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### Web Connect

### Introduction

As **Lakeside State Bank** completes its system conversion to **RCB Bank**, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

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

**Thank you for making these important changes!**

### Documentation and Procedures

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**Task 1:** Connect to **Lakeside State Bank** for final download before 4p.m. **Central, Friday, April 22, 2022**

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1. Backup your Quicken Windows Data File. Go to File>Backup and Restore>Backup Quicken File.
2. Download the latest Quicken Update. Go to Help>Check for Updates.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

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**Task 2:** Disconnect to **Lakeside State Bank** for a final download before **4 p.m. Central, Friday, April 22, 2022**

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1. Deactivate online banking connection for accounts connected to the financial institution that is requesting this change.

- a. Choose Tools>Account list.
- b. Click Edit on the account to deactivate.
- c. In Account Details, click Online Services.
- d. Click Deactivate. Follow prompts to confirm deactivation.
- e. Click the General tab.
- f. Delete Financial Institution and Account Number information. Click OK to close window.
- g. Repeat steps for any additional accounts that apply.

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**Task 3: Reconnect Accounts to RCB Bank on or after 8:30 a.m. Central, Monday, April 25, 2022**

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2. Reconnect the online banking connection for your accounts.
  - a. Choose Tools>Account List.
  - b. Click Edit on the account you want to activate.
  - c. In Account Details, click Online Services and then choose Set up Now.
  - d. Type your institution's name in the search field and click Next.
  - e. Enter your financial institution credentials.
    - i. Express Web Connect uses the same credentials you use for your institution's online banking login.
    - ii. Direct Connect might require credentials that do not match your online banking credentials.

Important: If your credentials do not work, contact your financial institution.

- f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select Link to an existing account and select the matching accounts in the drop-down menu.

Important: Do NOT choose "Create a new account" unless you intend 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 or click Cancel.

- g. After all accounts have been matched, click Next and then Done.