



## Quicken® Windows 2008-2010 Web Connect to Direct Connect Conversion Instructions

As Wauchula State Bank transitions to the new Enhanced Online Banking and Bill Pay, there are some steps that you will need to take that will modify your Quicken settings to ensure a smooth transition of your data. You will need your customer ID and PIN. This update may be time sensitive and should only take about 15-30 minutes.

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.



Although your transactions will be available back to January 1, 2011, as a precaution, you may wish to download your transactions through April 22, 2011.

### A. Back up your current data

1. Choose File menu -> Backup
2. Specify which file to back up and where you want the backup saved in the Quicken Backup dialog, and then click OK.

### B. Download the latest Quicken Update.

1. Click the **Update** icon on the Quicken toolbar
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 Quicken. Reopen Quicken.



### C. Get your latest transactions

1. Log in online banking at [www.wsbfl.com](http://www.wsbfl.com) . Download your transactions to Quicken.
2. Once the transactions are downloaded, accept all transactions into your Quicken account register.
3. Repeat this step for each account (such as checking, savings, credit cards and brokerage) that you use for online banking or investing.



NOTE: You may not be able to download these transactions after the new Enhanced Online Banking & Bill Pay has been activated.



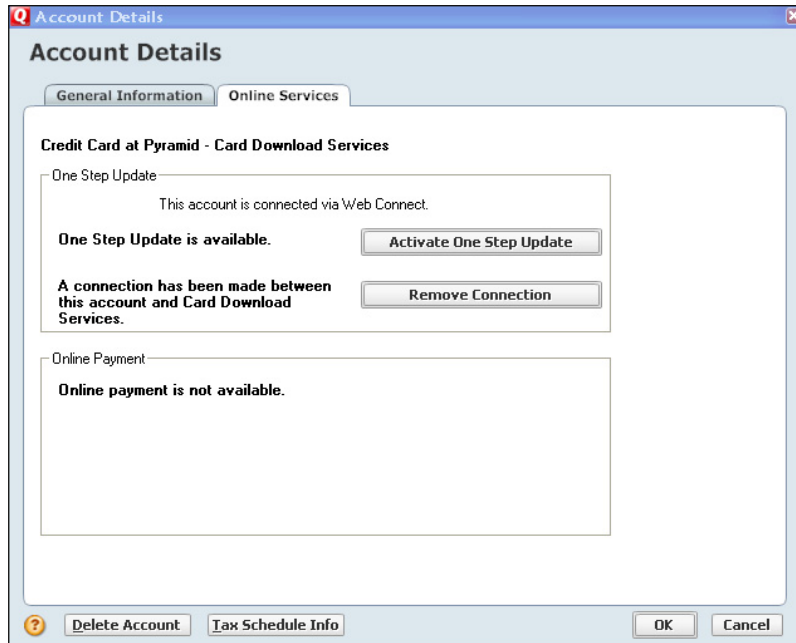
IMPORTANT: You will not be able to proceed to the next section until you accept all transactions in the Downloaded Transaction tab.

### D. Deactivate your Account from Web Connect

1. Right click the account in the Quicken Account List.
2. Select **Edit Account** from pop-up.



3. Click the online Services tab -> click the Remove Connection button



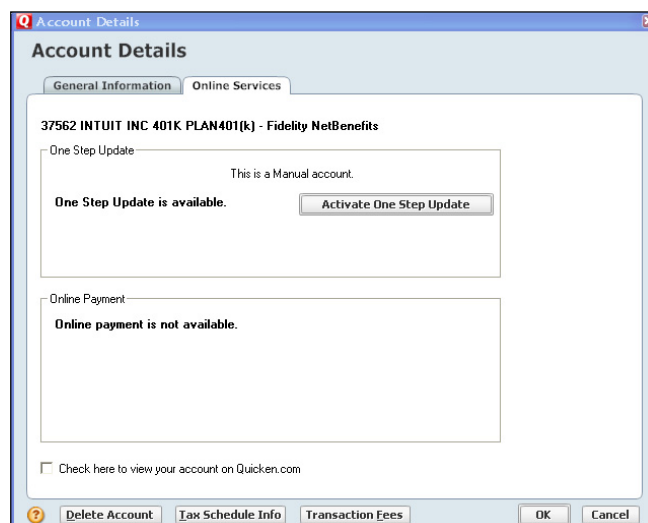
4. Quicken will prompt you to confirm deactivation -> click Yes -> click OK.

E. Activate your Account(s) for Direct Connect

1. Right click your account from the Quicken Account List -> select **Edit Account** from the pop-up.



2. Click the **Online Services** tab. In the **One Step Update** section, it will state the connection method is a **Manual Account** -> click **Activate One Step Update**.



3. Follow the Account Setup to activate your account for online banking.

## F. Using Online Bill Pay



NOTE: If you are not a bill pay customer, you can skip this section.

1. Choose **Tools** -> **Online Center** (2010) or **Online Menu** -> **Online Center** (2009-2008).
2. Choose Wauchula State Bank from the drop-down list.
3. Select the **Payments** tab -> type your payee's name in the **Payee** field -> press the **TAB** key.
4. In the Set Up Online Payee window, enter your payee's contact and account information. Click **OK**.
5. Review the information on the **Confirm Online Payee** information screen -> click **Accept** to continue (if you need to edit the information, click Cancel and make the necessary changes).

6. Create an Online Payment.
7. Fill in the remaining fields for the payment that you wish to make (payment amount, processing or delivery date, category and memo). Click **Enter**.
8. Click **Update/Send**.



NOTE: Wauchula Sate Bank supports deliver dates, which means that funds are withdrawn on the date that you schedule your payee to receive payment.

Thank you for making these important changes!