



## Quicken® Windows 2008-2011 Web 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.



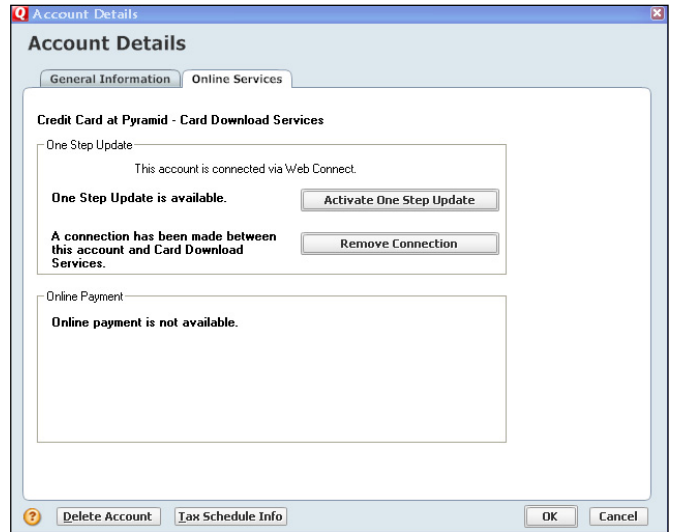
IMPORTANT: You will not be able to proceed to the next section until you accept all transactions in the Downloaded Transaction tab.

### 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**.

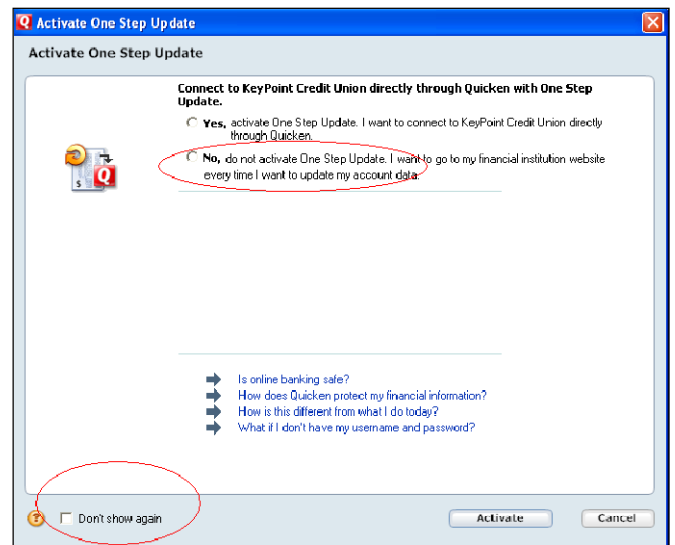


#### E. Activate Web Connect

1. Login to [www.wsbfl.com](http://www.wsbfl.com) from an external browser to initiate a download of a Web Connect file into Quicken (.QFX). When presented with the screen below, choose the "Use and existing Quicken Account" radio button



 **NOTE:** Now the account will be connected via Web Connect. Quicken may prompt you to activate One Step Update after a successful Web Connect download. Please select **No do not activate** and check the box to not be prompted again.



Thank you for making these important changes!