Quicken Conversion Instructions

Express Web Connect and Web Connect

Introduction

As ***First Foundation Bank Business*** completes its system conversion**,** 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 login credentials for online banking.

> **NOTE:** **Express Web Connect** uses the same User ID and Password as your financial institution's website.

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

Task 1: Conversion Preparation

1. Backup your data file. Go to **File** > **Backup and Restore** > **Backup Quicken File**.

2. Download the latest Quicken Update. Go to **Help** > **Check for Updates**

Task 2: *Optional task* - Complete a final download **before** *2/19/2021*

1. Choose **Tools** menu > **One Step Update**.

2. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.

3. In the **One Step Update Settings** dialog, make sure all items are checked and click **Update Now**.

4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

> **NOTE:** If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

Task 3: Disconnect Accounts in Quicken on or after *2/22/2021*

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 the 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 to be disconnected.

Task 4: Download transactions manually to *First Foundation Bank – Business* on or after *2/22/2021*

1. Download your Quicken Web Connect file from https://www.firstfoundationinc.com/

> **NOTE:** Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

2. Click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.

3. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

IMPORTANT:	Do **NOT** select **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, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.

4. Repeat steps for each account to be reconnected.

Task 5: Reconnect Accounts to *First Foundation Bank* on or after *3/1/2021 (Express Web Connect Only)*

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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.

4. Click **Set up Now**.

5. Use **Advanced Setup** to activate your account.

6. Enter *First Foundation Bank – Business* 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 from your Financial Institutions 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.

IMPORTANT:	Do **NOT** select **Add to Quicken** 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, select **Ignore – Don't Download into Quicken**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.

11. Click **Done** or **Finish**.