Quicken Visa Update Instructions

* To be completed prior to your next download of Visa information from eBranch *

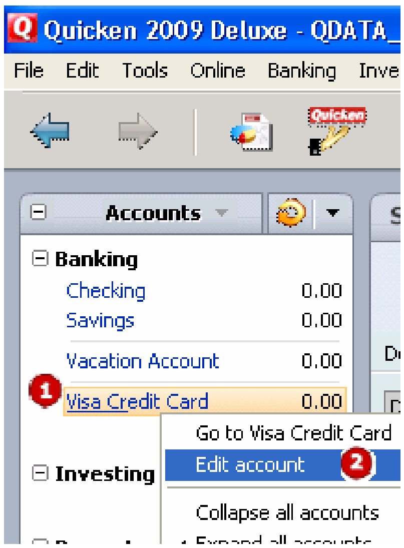
If you have previously downloaded information from eBranch into your Quicken Visa account, please follow the steps below to continue using your existing Visa account register and complete a download in eBranch.

Quicken Personal Software for Windows
Account Conversion Instructions

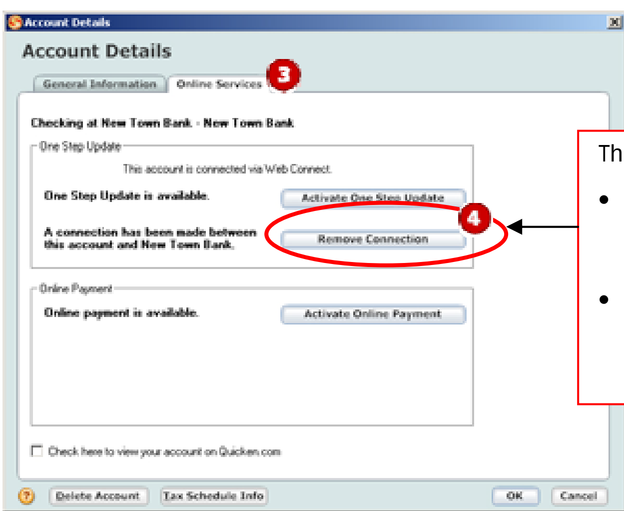
Step 1:

❖ Remove current Financial Institution Connection:

- ✓ **Open** your **Quicken** account
- ✓ **Right-click** on your Visa account from the list under Cash Flow Center. 1
- ✓ Select Edit account from the menu. 2



- ✓ In the Account Details dialog, click the **Online Services** Tab. 3



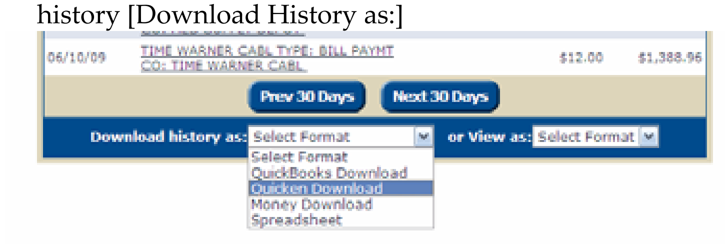
This button varies:

- If you manually download transactions, this button displays as **Remove Connection**.
- If you use One Step Update to automate downloading your transactions, this button displays as **Remove from One Step Update**.

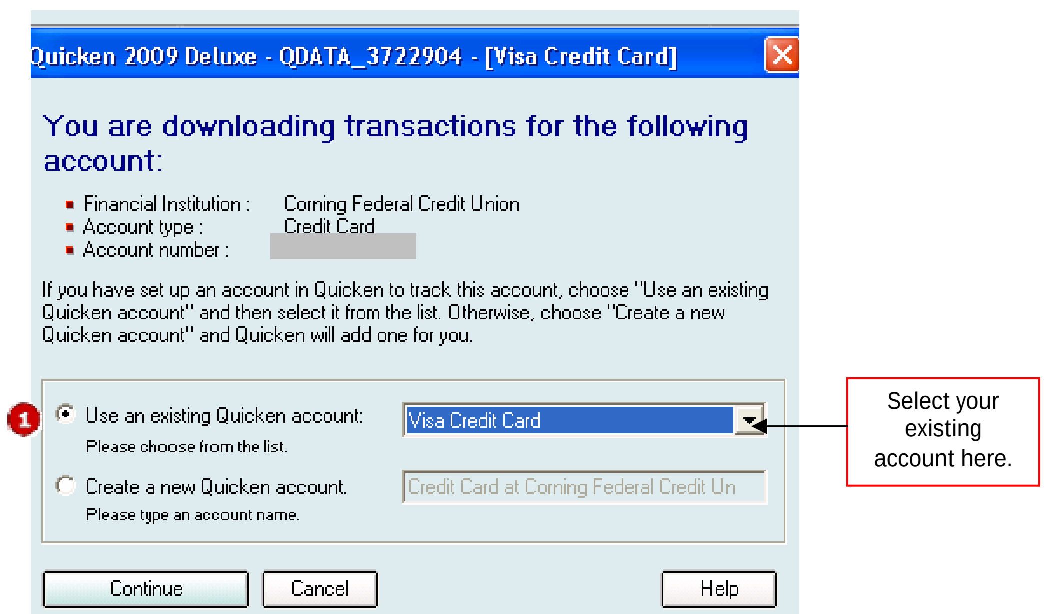
- ✓ Click **Remove Connection** or **Remove from One Step Update** in the One Step Update area. 4
- ✓ Click **OK** to close the Account Details dialog.
- ✓ Log out of Quicken

Step 2:

- ❖ Download Transactions/ Establish a New Connection
  - ✓ **Log in to eBranch** and go to the Visa Account History
    - o Note – You may want to do a Detail Search to get date range you desire.
    - o **Important**: to avoid the possibility of creating duplicate records when downloading into Quicken, select a date range that does not include records previously downloaded.
  - ✓ Select **Quicken Download** from the dropdown box at the bottom of your Visa history [Download History as:]



  - ✓ Click the **Use an existing Quicken account** radio button. In the corresponding drop-down list, select the Quicken account. ❶

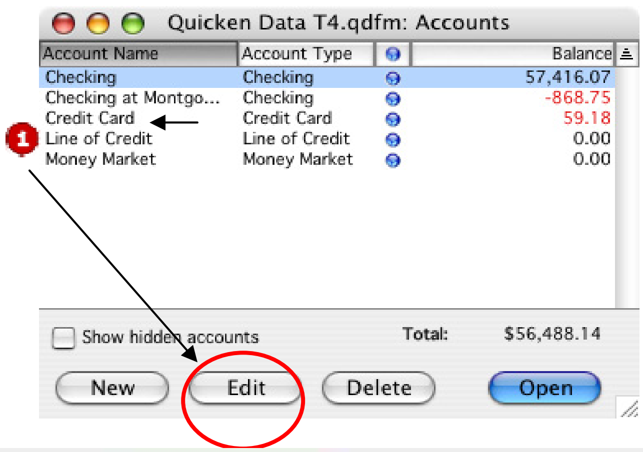


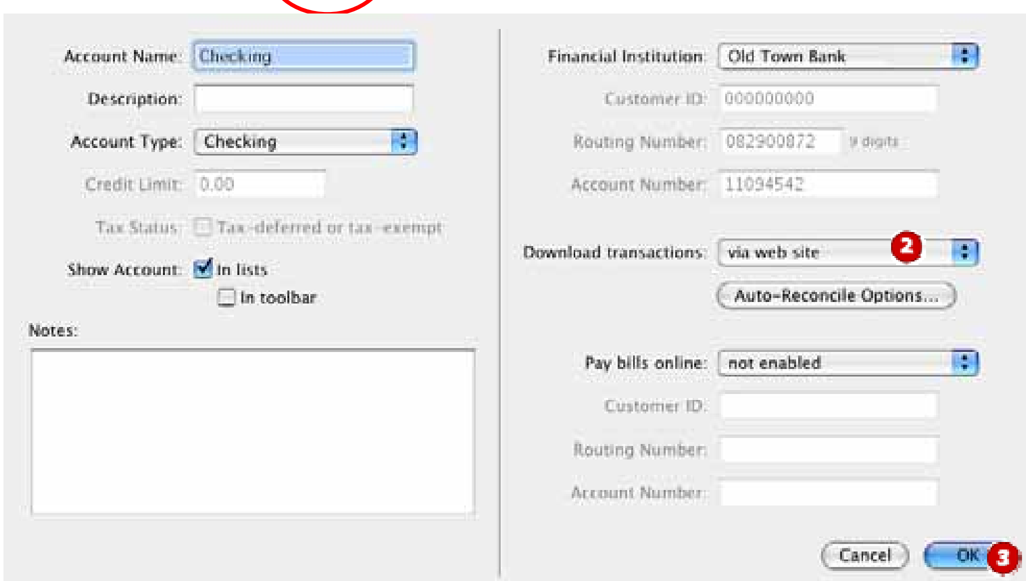
Quicken <u>for Mac</u> Personal Software Account Conversion Instructions.

<u>Step 1:</u>

❖ <u>Remove current Financial Institution Connection:</u>

- ✓ **Open** your **Quicken** account
- ✓ Choose **Lists** menu **-> Accounts**
- ✓ Select the Visa account and click Edit. 1
- ✓ In the Download Transactions: drop-down list, select **not enabled**. Click **OK** to the prompt, "You are about to disable…"(not shown) 2
- ✓ Click OK to save your edits. 3
- ✓ Log out of Quicken

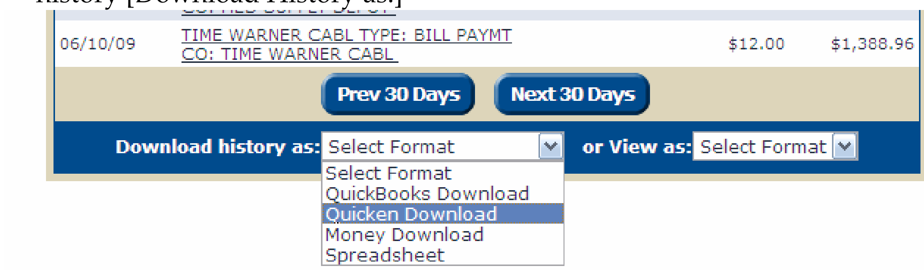




Step 2:

❖ Download Transactions/ Establish a New Connection

- ✓ **Log in to eBranch** and go to your Visa Account History
  - o Note – You may want to do a Detail Search to get date range you desire.
  - o **Important**: to avoid the possibility of creating duplicate records when downloading into Quicken, select a date range that does not include records previously downloaded.
- ✓ Select **Quicken Download** from the dropdown box at the bottom of your Visa history [Download History as:]



- ✓ Click the **Use an existing Quicken account** radio button. In the corresponding drop-down list, select the Quicken account.