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Quicken for Windows Conversion Instructions

Quicken for Windows 2012–2014

Web Connect

As **Logansport Savings Bank** completes its internet banking upgrade, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your login credentials for the **Logansport Savings Bank** website.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

NOTE: This update is time sensitive and can be completed on or after **10/20/2014**.

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up Your Data** and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Checking for Updates to Quicken** and follow the instructions.

Task 2: Deactivate Your Account(s) At Logansport Savings Bank

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** or **Edit Details** button of the account you want to deactivate.

3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate** or **Remove from One Step Update**. Follow the prompts to confirm the deactivation.

NOTE: The name of the buttons referenced above may vary depending on the services and the version of Quicken you are using.

5. Click on the **General** or **General Information** tab. Remove the **Account Number**.
6. Remove the name of the **Financial Institution**. Click **OK** to close the window.
7. Repeat steps 2–6 for each account at *Logansport Savings Bank*.

Task 3: Re-activate Your Account(s) at Logansport Savings Bank

1. Log in to *Logansport Savings Bank* web site at <http://www.logansportsavings.com>.
2. Download and import your transactions to Quicken.
3. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link** to an existing account or **Use an Existing** Quicken account and select the matching account in the drop-down menu.

IMPORTANT: Do **NOT** select **Create a new account** or **Create a new Quicken account**. 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 2 – 3 for all of your accounts

IMPORTANT: Customers using **One Step Update** or **Express Web Connect** can use the following steps to reactivate online banking on or after **10/22/2014**.

Task 4: Re-activate Your Account(s) at Logansport Savings Bank

1. Open the account register that you want to enable for online account access.
2. Choose **Account Actions** menu > **Set Up Online**.
3. Enter *Logansport Savings Bank* and click **Next**.
4. Type 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.

5. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link** or **Exists in Quicken** and select the matching accounts in the drop-down menu.

IMPORTANT: Do **NOT** select **New** or **Add In Quicken**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

6. After all accounts have been matched, click **Next**.
You will receive confirmation that your account(s) have been added.
7. Click **Done** or **Finish**.

Thank you for making these important changes!