

Quicken Conversion Instructions

As Premier America completes the launch of new Online Banking, you will need to modify your Quicken settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for both Windows and Mac, and all three connectivity types (Direct Connect, Express Web Connect or Web Connect).

IMPORTANT: Express Web Connect will not be available until August 31st, 5 business days after August 24th, so please utilize another connectivity type if you need transaction updates during this downtime. There is no delay for Web Connect or Direct Connect.

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Quicken Windows Direct Connect and Express Web Connect

On or before August 23rd:

1. Back up your Quicken Windows Data File. Go to **File > Backup and Restore > Backup Quicken File**.
2. Download the latest Quicken Update. Go to **Help > Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

On or after August 24th:

1. Deactivate Online Banking connection for accounts connected to Premier America.
 - a. Choose **Tools > Account List**.
 - If you have hidden accounts, click box to **Show Hidden Accounts**. If you do not have hidden accounts, box will not appear.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - Please note the connection method displayed for you to reference in step 2. e.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Premier America from the Financial Institution field and delete Account Number information. Repeat steps for all Premier America Accounts, loans and lines of credit. Click **OK** to close window.
 - g. Repeat steps for any additional accounts that apply.
2. First, log in to new Online Banking to establish your password.
3. Then go to Quicken to reconnect the Online Banking connection for your accounts.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account you want to activate.
 - c. In Account Details, click **Online Services** and then choose **Set up Now**.
 - d. Type your institution's name in the search field and click Next.
 - e. Refer to the note you made in step 1.c..
 - Express Web Connect
 - Select Advanced Set Up
 - Select Express Web Connect
 - Enter the Premier America credentials you use to login to new Online Banking
 - Direct Connect - enter your Premier America credentials you use to log in to new Online Banking.

Important: If your credentials do not work, contact Premier America.
 - f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu.

Important: Do NOT choose "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, choose Ignore – Don't Download into Quicken or click Cancel.
 - g. After all accounts have been matched, click **Next** and then **Done**.

Quicken Mac Direct Connect and Quicken Connect

On or before August 23rd:

1. Backup Quicken Mac Data File and Update the application.
 - a. Choose **File > Save a Backup**.
 - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Accept all new transactions into the appropriate registers.

On or after August 24th:

Activate the Online Banking connection for accounts connected to Premier America Online Banking that is requesting this change.

1. First, log in to new Online Banking to establish your password.
 2. Second, go to Quicken then click your account in the Accounts list on the left side.
 3. Choose **Accounts > Settings**.
 4. Select **Set up transaction download**.
 5. Enter Premier America in the search field, select the correct option and click **Continue**.
 6. Enter your Premier America credentials.
 - Quicken Connect uses your Premier America Online Banking credentials to login.
 - Direct Connect uses your Premier America Online Banking credentials to log in.
- Important: If your credentials do not work, contact Premier America.**
7. In the “Accounts Found” screen, ensure you associate each new account to the appropriate account already listed in Quicken. **Under Action, choose Link to pick your existing account.**
Important: Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken.
 8. Click **Finish**.

Quicken Windows Web Connect

On or before August 23rd:

1. Backup Quicken Windows Data File and Update.
 - a. Choose **File > Backup and Restore > Backup Quicken File**.
 - b. Download the latest Quicken Update. Choose **Help > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Repeat this step for each account you need to update.
 - c. Accept all new transactions into the appropriate registers.

On or after August 24th:

1. Deactivate Online Banking connection for accounts connected to Premier America that is requesting this change.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Premier America from the Financial Institution field and delete Account Number information.
 - g. Click **OK** to close window.
 - h. Repeat steps for any additional accounts.
2. Reconnect Online Banking connection for accounts that apply.
 - a. Download a Quicken Web Connect file from Premier America's Online Banking site.
 - b. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
 - c. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
 - d. Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
 - e. Repeat this step for each account you have connected to this institution.

Quicken Mac Web Connect

On or before August 23d:

1. Backup your Quicken Mac data file and update the application.
 - a. Choose **File > Save a Backup**.
 - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Repeat this step for each account you need to update.
 - c. Accept all new transactions into the appropriate registers.

On or after August 24th:

Activate Online Banking connection for accounts connected to Premier America that is requesting this change.

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter your Premier America name in the search field, select the correct option and click **Continue**.
5. Log into Premier America's Online Banking site and download your transactions to your computer.
Important: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.
6. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web Connect** for the "Connection Type" if prompted
7. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, click **Link** to pick your existing account.
Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.
8. Click **Finish**.