Online Banking Web Connect Conversion
Quicken Windows 2010

PREMIER BANK
Expect the Best.

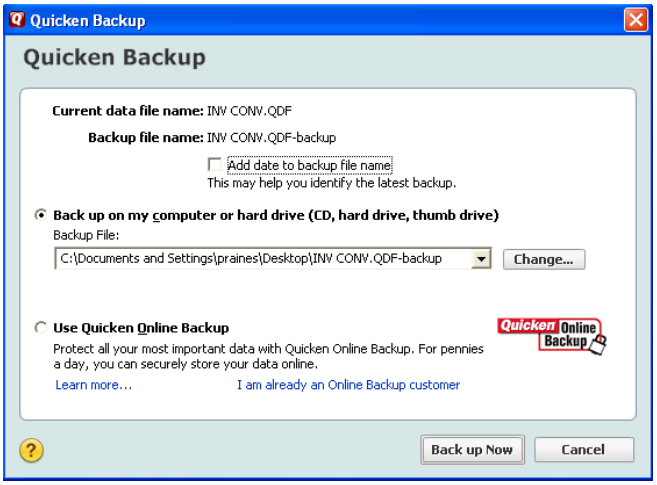
As your financial institution completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your customer ID/Password, PIN and security questions.

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. This conversion should take 15–20 minutes.

This update is time sensitive and can be completed on or after Thursday, August 25.

Back Up Your Current Data

1. Choose File menu → Backup and Restore → Back up Quicken file.
2. Specify where to back up your Quicken file, and then click on Back up Now.



Download the Latest Quicken Update

1. Click on the Tools menu and select One Step Update (Click Cancel if presented with Password Vault dialog).
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 and reopen Quicken.

Get Your Latest Transactions

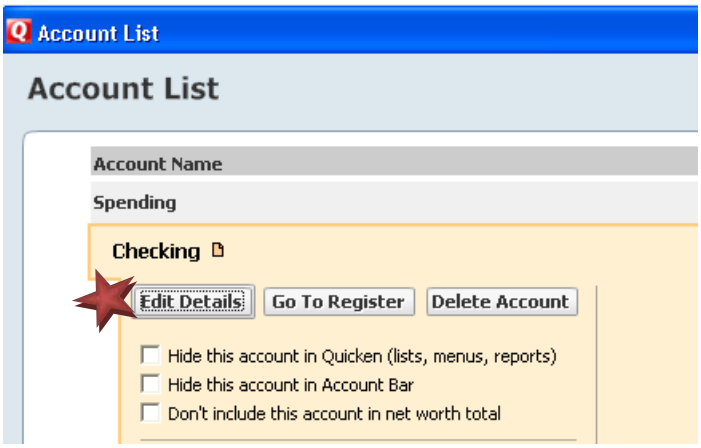
1. Log into your financial institution's web site. Download your transactions into Quicken.
2. Once the transactions are downloaded, accept all the transactions into your Quicken account register.
3. Repeat this step for each account that you use for online banking or investing.

Note: You may not be able to download these transactions after the conversion.

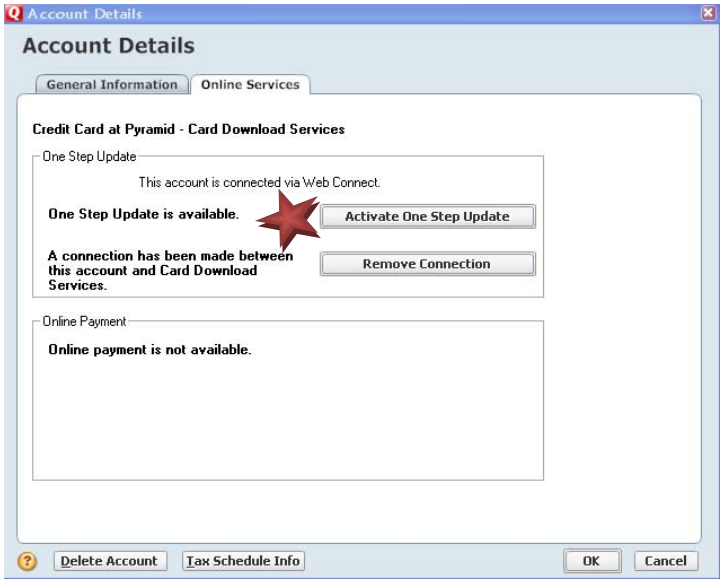
Important: You will not be able to proceed to the next section until you accept all transactions in the Downloaded Transactions tab.

Deactivate Web Connect

1. Click on the Tools menu → select Account List. Highlight the account you want to deactivate → click on the Edit Details button.

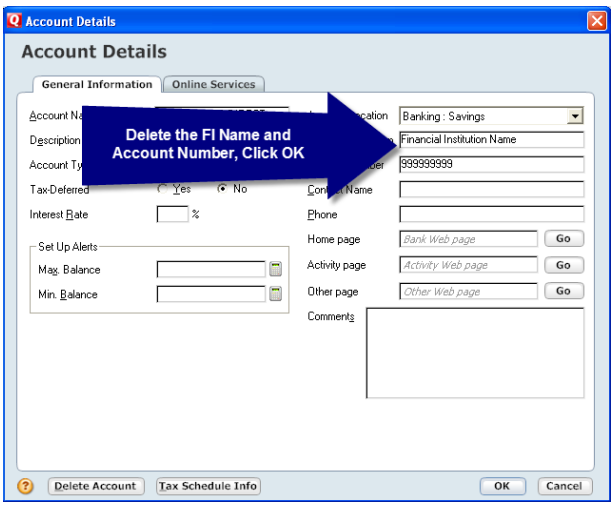


2. Click the Online Services tab → click the Remove Connection button.



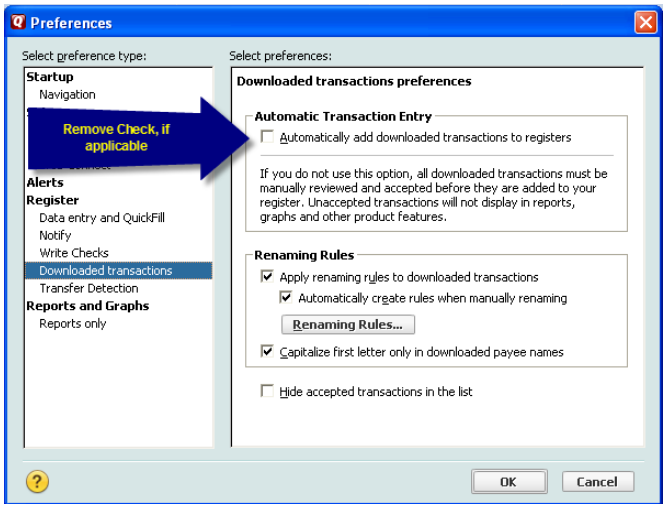
3. Quicken will prompt you to confirm deactivation → click Yes → click OK.

4. Select the General tab and remove the Financial Institution Name and Account Number as shown below. Click OK to save changes.



Change Download Preferences

1. Click on the Edit menu → click on Preferences → Quicken Services
2. Select Downloaded Transactions in left column
3. Remove check from "Automatic Transaction Entry", if applicable
4. Click OK



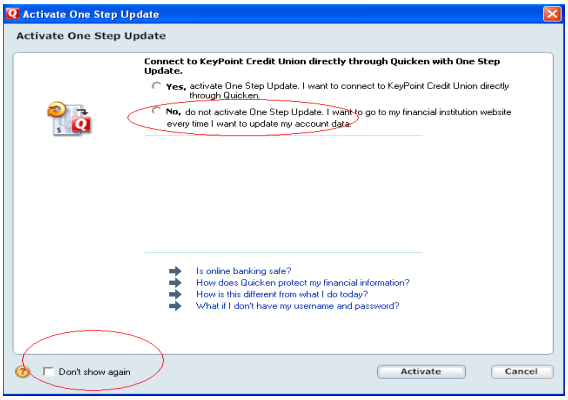
Activate Web Connect

1. Log into your financial institution's website 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 an existing Quicken account" radio button

2. The One Step Update Summary screen will appear, confirming the account updated successfully.

3. Complete steps 1 and 2 to reactivate each account for online banking.

NOTE: Now the account will be connected via Web Connect. Quicken may prompt 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.



Congratulations, you have completed the necessary changes!