



Quicken for Windows Enhancement Instructions

Quicken for Windows 2013-2015

Web Connect

Introduction

As Rondout Savings Bank completes its system enhancement, 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 User Name and Password for the Rondout 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.

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 **Update Software** and follow the instructions.

Task 2: Connect to **Rondout Savings Bank** for a final download by **9/16/2015**

1. Log in to **www.rondoutbank.com** and download your Quicken Web Connect file.
2. Click **File** > **File Import** > **Web Connect File**.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.
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.