



Quicken for Windows Conversion Instructions

Web Connect to Direct Connect

Introduction

As **Sabadell United Bank** completes its system conversion to **IBERIABANK**, 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 ID and Password for each Financial Institution. Download your transaction history from the **Sabadell United Bank** Online Banking system using your current login credentials. On or after October 16, 2017 at 7 AM ET, you will need to use the login credentials provided to you in the Online Banking letter sent to you by **IBERIABANK**. You will then follow the instructions in task# 4 to reconnect your accounts in Quicken.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

Documentation and Procedures

Task 1: Conversion Preparation

1. Back up 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 **Sabadell United Bank** for a final download before **3 PM ET – Friday, October 13, 2017**

1. Download your Quicken Web Connect file from **Sabadell United Bank**
2. Click “**File**” > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.
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.

Task 3: Disconnect Accounts at **Sabadell United Bank** on or after **3 PM ET – Friday, October 13, 2017**

1. Choose “**Tools**” menu > “**Account List**”.
2. Click the “**Edit**” button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the “**Online Services**” tab.
4. Click “**Deactivate**”. Follow the prompts to confirm the deactivation.
5. Click on the “**General**” tab.
6. Remove the financial institution name and account number. Click “**OK**” to close the window.
7. Repeat steps for each account to be disconnected.

Task 4: Reconnect Accounts to **IBERIABANK** on or after **7AM ET - Monday, October 16, 2017**

1. Choose “**Tools**” menu > Account List.
2. Click the “**Edit**” button of the account you want to activate.
3. In the Account Details dialog, click on the “**Online Services tab**”.
4. Click “**Set up Now**”.
5. Use Advanced Setup to activate your account.
6. Enter **IBERIABANK** in the search field, select the name in the list and click “**Next**”.

7. If presented with the Select Connection Method screen, select "**Direct Connect**".
8. Type your Direct Connect "**User ID and Password**" and click "**Connect**".
9. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select "**Link**" to an existing account and select the matching accounts in the drop-down menu.

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

10. After all accounts have been matched, click "**Next**". You will receive confirmation that your accounts have been added.
11. Click "**Done or Finish**".