Quicken® for Windows 2012
## Online Banking Web Connect Conversion

As Platte Valley Bank completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need to be able to log into www.plattevalleybank.com with your Access ID and Password.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online service may stop functioning properly. This conversion should take 15-20 minutes.

These steps can be completed on October 10, or later.

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 → click Back up Now.
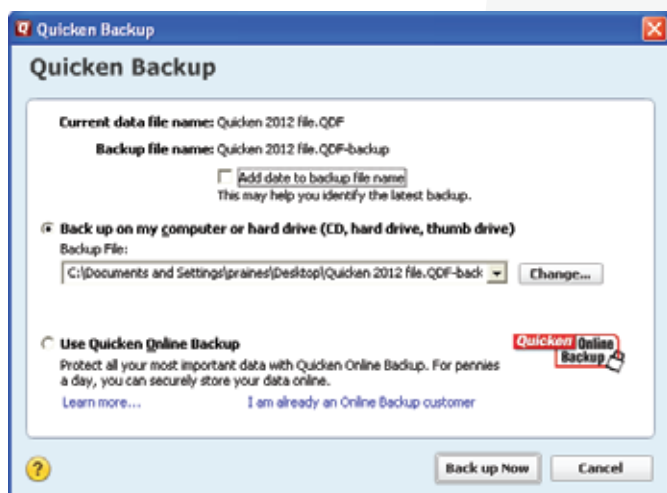
Download the Latest Quicken Update

1. Click on the Tools menu and select One Step Update (If the Password Vault prompt appears, click Cancel).
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 and reopen Quicken.

Get Your Latest Transactions

1. Log into www.plattevalleybank.com. 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.
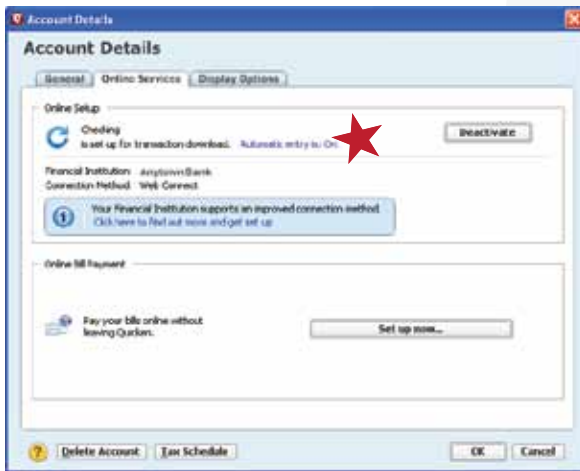
IMPORTANT   **You will not be able to proceed to the next section until you accept all transactions in the Downloaded Transactions tab.**
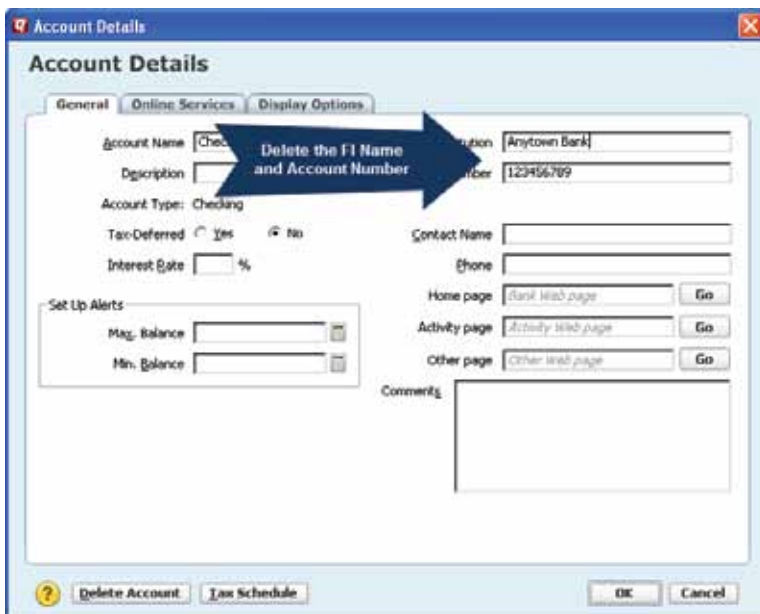
Deactivate Web Connect

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

2. Click the Online Services tab → click Deactivate.

3. Quicken will prompt you to confirm deactivation → click Yes.
4. If Automatic entry is On, click on the link and select No - Never automatically add transactions for this account. Click OK.
5. Select the General tab and remove the Platte Valley Bank Name and Account Number as shown below → click OK to save changes.
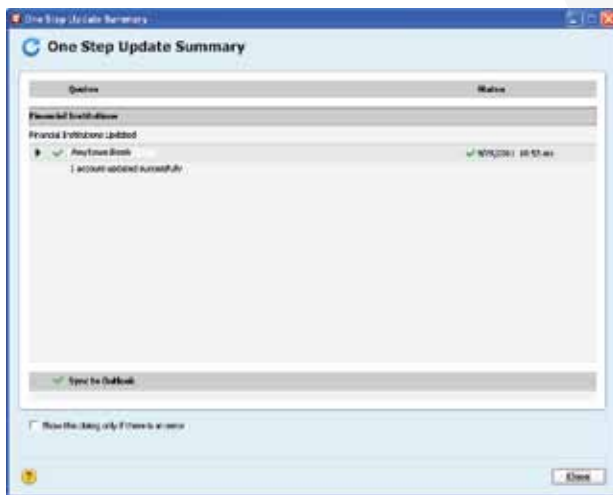
Activate Web Connect

1.	Log into www.plattevalleybank.com from an external browser to initiate a download of a Web Connect file into Quicken (.QFX). When presented with the screen below, choose the "Link to an existing account" radio button and select the appropriate account from the menu. Click Import.
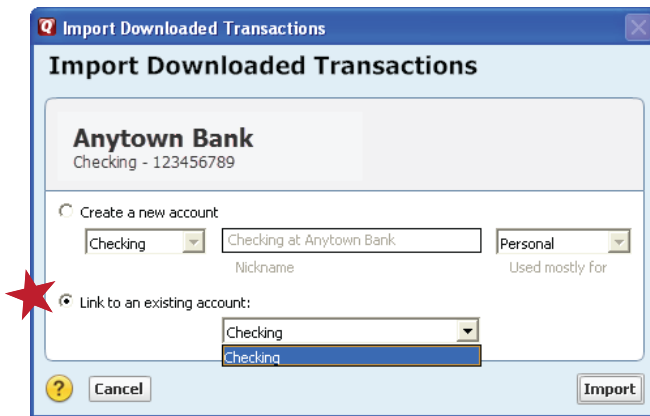
2.	The One Step Update Summary screen will appear, confirming the account updated successfully.
3.	Complete steps 1 and 2 to reactivate each account for online banking.

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!

Platte Valley Bank ®
www.plattevalleybank.com