

QUICKEN® FOR WINDOWS®: WEB CONNECT INSTRUCTIONS

As **Bank One** completes its system conversion to **Chase**, you will need to modify certain information in your Quicken software to ensure a smooth transition of your data. **You must complete the following steps after March 25th.**

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 not work properly.

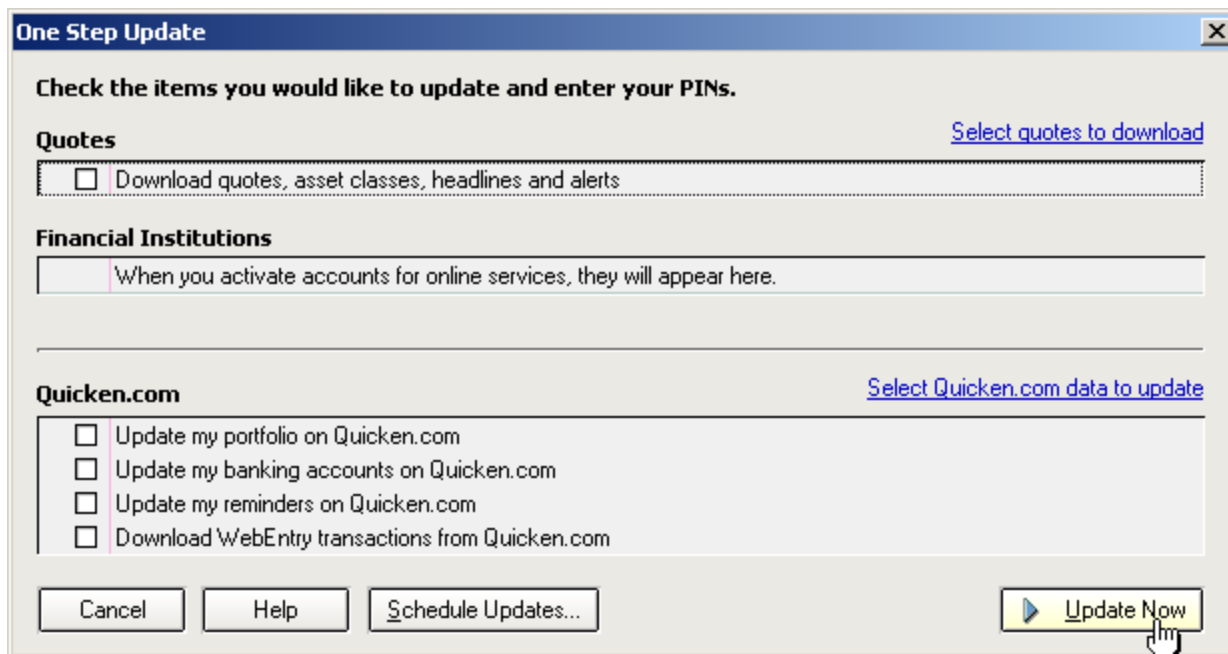
1.

INSTALL THE LATEST QUICKEN UPDATE

Follow the steps in this section to determine if a Quicken update is available and to download the update if it is available.

1. From the Quicken **Online** menu, choose **One Step Update**.
2. Uncheck all options in the One Step Update dialog box and click **Update Now**.
3. If an update is available, apply it now.
4. Exit and restart Quicken.

For more information about Quicken updates, see <http://www.intuit.com/support/quicken/updates>.



2.

BACK UP YOUR QUICKEN DATA

To back up current data, from the Quicken **File** menu, choose **Backup**, enter information as needed in the Quicken Backup Dialog Box, and then click **OK**.

Learn more.' and a 'Settings...' button. At the bottom of the dialog are three buttons: 'Help', 'Cancel', and 'OK'. A mouse cursor is pointing at the 'OK' button."/>

Quicken Backup [X]

1. Select the Quicken file to back up

Back up your current file or specify another file below:

C:\Documents and Settings\My Documents\Quicken\quicken.QDF [Browse ...]

Add date to file name (webdownload_20060303).
This will help you identify which file is the latest backup.

2. Where do you want to save your backup file?

On my computer

Select the disk drive and path to the backup folder:

C:\Documents and Settings\My Documents\Quicken\BACKUP [Browse ...]

Insert your formatted backup disk in a drive now. Alternate between two instead of always backing up to the same disk.

Use Windows CD Writing Wizard.

Online

Protect your Quicken data from computer failure, theft and fire with Quicken Online Backup. Enjoy offsite storage, automatic backups and easy retrieval. [Learn more.](#) [Settings...]

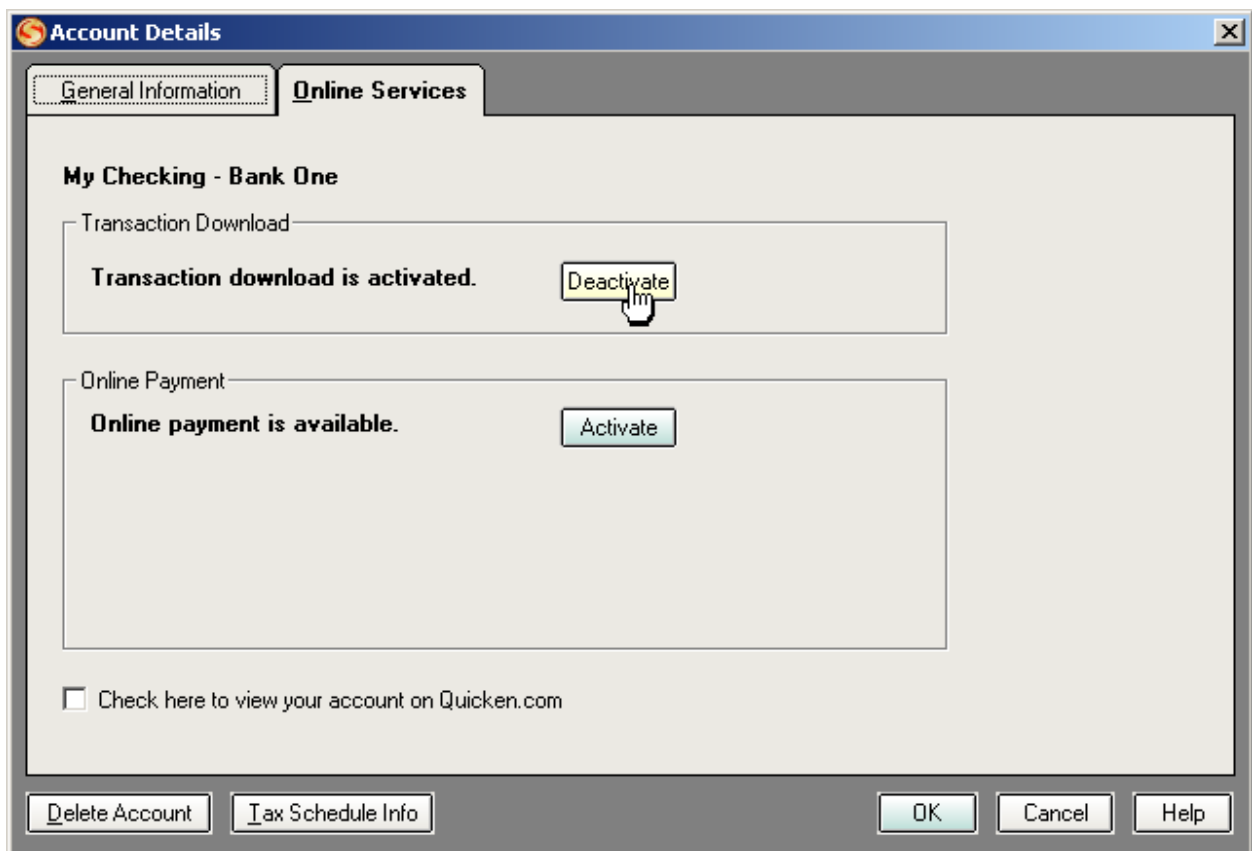
[Help] [Cancel] [OK]

3.

DEACTIVATE YOUR ACCOUNTS WITH BANK ONE

1. Go to the **Tools** menu, **Account List** and select the first deposit account at [Bank One](#).
2. Click **Edit** at top of dialog.
3. Click the **Online Services** tab.
4. Click **Deactivate** in the Transaction Download area.
5. In the dialog box that prompts, "Would you like to disable this service," click **Yes**.
6. In the dialog box that prompts, "You are about to delete setup information for an online account," click **OK**.

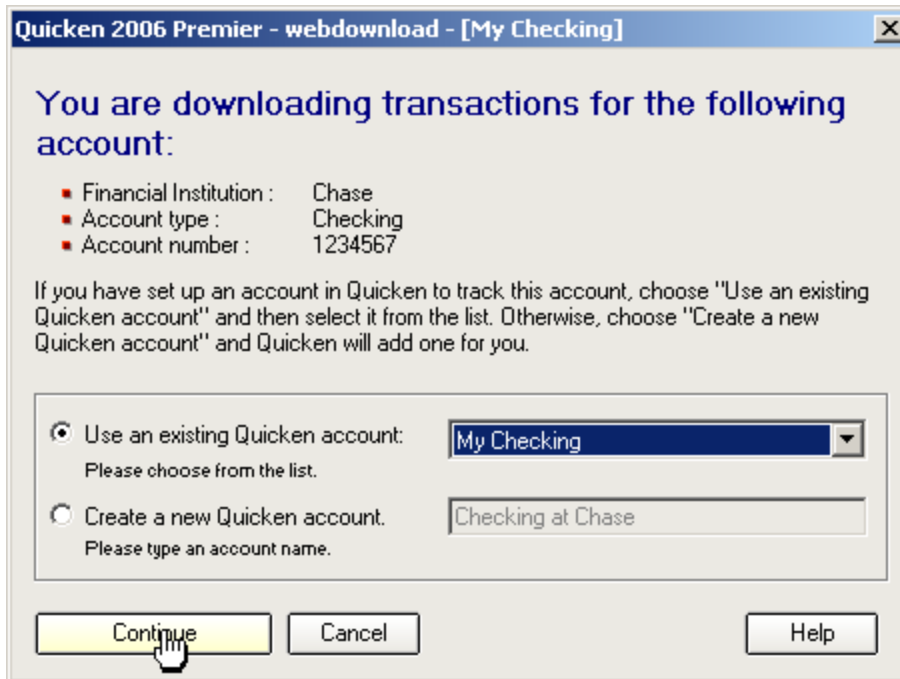
Repeat these steps until all [Bank One](#) accounts have been disabled.



4.

DOWNLOAD YOUR TRANSACTIONS

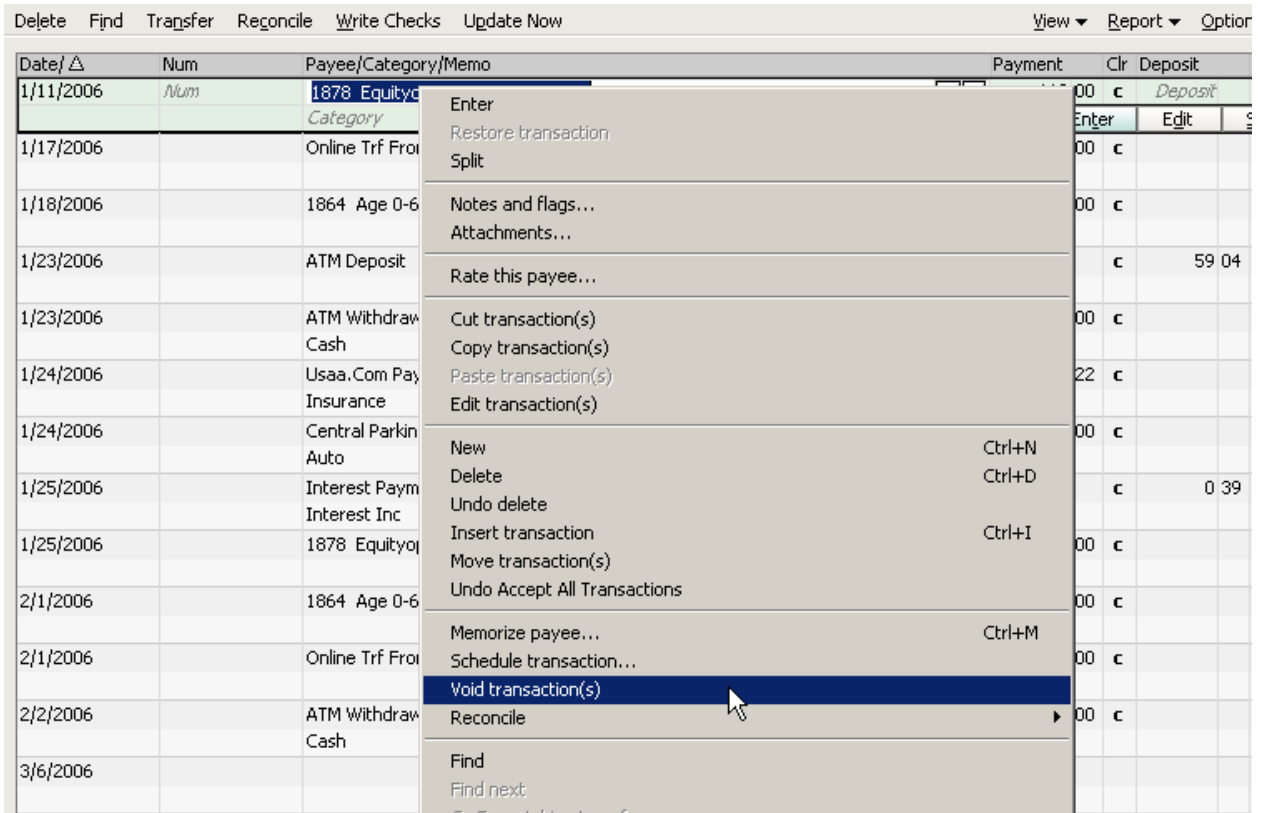
1. With your Web browser, log on to Chase.com and download your transactions into Quicken.
2. In Quicken, go to the "You are downloading transactions for the following account" dialog box and click "**Use an existing Quicken account.**" In the adjacent list box (at right), choose the Quicken account that you used for [Bank One](#).



5.

ACCEPT OR DELETE TRANSACTIONS IN QUICKEN

1. Go to your Account Register to review the downloaded transactions at the bottom of the register.
 - If a transaction is already in your Account Register, click **Edit** then **Delete** and **Yes** for that transaction.
 - If a transaction is not in your Account Register, click **Accept** to save the transaction into your Account Register.
 - Accept or Delete downloaded transactions for each of your deposit accounts.
2. Due to our upgrades, you may download duplicate transactions.
 - Select a Duplicate transaction, then right-click your mouse and select **Void Transaction(s)** from the pop-up menu.
 - Click **Enter** to void the transaction. VOID will be added to the Payee Name field and the Amount field will be blank for that transaction.



THANK YOU FOR MAKING THESE IMPORTANT CHANGES!

If you have any questions regarding these instructions, please contact us at 1-866-636-9500, 8:00 AM to 10:00 PM Eastern time, seven days a week.