#### Online Banking Direct Connect Conversion Quicken Windows 2008-2010



As Fifth Third Bank 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 and PIN.

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 15–30 minutes.



This update is time sensitive and must be completed between 08/29/2011 and 09/12/2011.

This detour symbol indicates section instructions that are using bill pay within Quicken only. If you do not use Quicken to make online bill payments, then you can skip these sections or steps.

# BACK UP YOUR CURRENT DATA

- **1.** Choose File menu  $\rightarrow$  Backup.
- **2.** Specify which file to back up and where you want the backup saved in the Quicken Backup dialog, and then click OK.

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#### DOWNLOAD THE LATEST QUICKEN UPDATE



- 1. Click the Update icon on the Quicken toolbar.
- 2. Uncheck all boxes  $\rightarrow$  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. Reopen Quicken.

## DELETE REPEATING ONLINE PAYMENTS



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If you are not a use bill pay within Quicken, you can skip this section.

A repeating online payment is one made automatically by Quicken after you have sent one initial online payment instruction that specifies the payment amount, frequency, and delivery dates. After creation, your financial institution will continue to send payments until you cancel the transaction or until it expires

- 1. Choose Cash Flow menu → Scheduled Transaction List.
- 2. Click the Repeating Online tab.
- 3. Click <u>Print</u> to save your list of repeating payments. (You'll use this when you recreate these payments later on)
- Click to highlight the first payment in the Name/Payee column, and click Delete. Click Delete again to confirm. The transaction Method changes from Repeat to Repeat-Cancel.

Scheduled Transaction List									_ 0
nter Skip <b>Create Ne<u>w</u> –</b> E <u>d</u> it Delete							Options 🗸	Print	How Do
Monthly Bills & Deposits All Types	Scheduled R	tepeating On	line						
	☑ Show graph	✓ Show cale	ndar						
Name/Payee	Amount	Date	Show in List	#Left	Method	Frequency	Web	Acti	on
Boulder Mortgage	-2,500.00	2/20/2006	5 days before		Repeat	Monthly		(Auto)	Edit
									_

- 5. Repeat step 4 for each additional repeating online payment.
- 6. Close the Scheduled Transaction List dialog when complete.

# DELETE PENDING ONLINE PAYMENTS



IMPORTANT: This step must be completed by 09/15/2011 to avoid possible duplicate payment. If you do not cancel payments scheduled to be paid after 09/15/2011, then it is possible that these payments will still be processed.

- Choose Tools → Online Center (2010) or Online menu → Online Center (2009-2008).
- 2. Select your financial institution from the Financial Institution drop-down list.
- **3.** Click the Payments tab.

Dele	te Payees Repeating Contact Info	PIN V	ault Renaming Rules		Trade Print Options
	ancial Institution: I Town Bank Transfers ansactions Payments Transfers Account: Old Town Checking	E- <u>m</u> ail(0) Register Balance	e: 424.50		Update/Send 2 instructions
t Ur h Tr	Payee	Split Memo	Processing date ( <sup>ASAP</sup>	Delivery date	Enter
	Payee	Amount Num	Status	Processing	Delivery
11	Starbucks	15.00	Scheduled for delivery on 2/21/2006		2/21/2006
	Davi Care				



Click Print to save your list of pending payments. You can use this when you recreate and send these payments later on

Cancel payment for each Payee with a Status that is scheduled for delivery on a date after 09/15/2011. Select the first payee → click Cancel Payment.

\*\*The Status column reflects this change by noting Cancel payment instruction ready to send.

5. Repeat step 5 for each payee with a pending payment after the system upgrade.

## GET YOUR LATEST TRANSACTIONS

- 1 Choose Tools → Online Center (2010) or Online menu → Online Center (2009-2008).
- 2. Select your financial institution from the Financial Institution drop-down list.
- **3.** Click the E-mail tab and view any e-mails, if necessary.
- 4. Click Update/Send
- In the Online Update for this account make sure all items are checked. Enter your password → click Update Now.

**6.** If new transactions display in the Online Update Summary window, accept them in your Quicken account register.



# **DEACTIVATE YOUR ACCOUNT(S)**

 Right-click your account from the Quicken Account List → select Edit account from the popup.



Account Details
Account Details
General Information Online Services
37562 INTUIT INC 401K PLAN401(k) - Fidelity NetBenefits
One Step Update This account is connected via Direct Connect.
One Step Update is activated. Remove from One Step Update
Online Payment
Online payment is not available.
Check here to view your account on Quicken.com
Delete Account Iax Schedule Info Transaction Fees  OK Cancel

- Click the Online Services tab. In the One Step Update section, it will state the connection method the end user is using. Have the Quicken user disable the account by clicking on the "Remove from One Step Update" button.
- **3.** Click OK to close the Account Details dialog.
- Repeat steps 1 through 3 for each account (such as checking, savings, and credit cards). Verify that each account is deactivated by choosing Tools menu → Account List. As each online account is deactivated, the word Activated disappears for each account in the Online Services column.

# ACTIVATE YOUR ACCOUNT(S)

1. Right-click your account from the Quicken Account List → select Edit account from the popup.

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2. Click the Online Services tab. In the One Step Update section, it will state the connection method is a Manual account → click Activate One Step Update

Q Account Details		×						
Account Details								
General Information Online Services								
37562 INTUIT INC 401K PLAN401(k) - Fidelity	y NetBenefits							
One Step Update								
This is a Manua	This is a Manual account.							
One Step Update is available.	Activate One Step Update							
Unline Payment								
Unline payment is not available.								
Check here to view your account on Quicken.com								
(2) Delete Account Tax Schedule Info	Transaction Fees	OK Cancel						

3. Follow the Account Setup to activate your account for online banking.

#### **RECREATE PENDING ONLINE PAYMENTS**



If you do not use bill pay within Quicken, CONGRATULATIONS your conversion is complete!

If Choose Tools  $\rightarrow$  Online Center (2010) or Online menu  $\rightarrow$  Online Center (2009-2008).

- 1. Select "Fifth Third Bank New" from the Financial Institution drop-down list → Click the Payment tab.
- Recreate your online payment → click Enter after the entry is complete → repeat until all online payments have been recreated. You may have printed a list of your pending online payments earlier in this process.
- 3. Click Update/Send.
- In the Online Update for make sure all items are checked → enter your customer ID and PIN
  → click Update Now.

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	<u>D</u> elete Payees	Repeating	⊆ontact Info	PIN Vault	Renaming Rules		Trade Print	Options 🗸
	Financial Institution	c					Update/: 1 instru	iend
	Tr <u>a</u> nsactions	Payme <u>n</u> ts	Transfers E-mail(0					
	Account	Checking		Register Balance:	96,421.28			
		Charlessol			Processing date	Delivery date	2/16/2006	]
	Payee	plarbucks	,	1		<b>X</b> 3		·
Online Update for this account			×	Memo			Enter	)
Mall New Town Bank			PIN: *****		h		0.1	
Pay \$100.00 to Day Care by 2/16/2006 from Checking according to the second s	unt			unc ivum sca 100.00 Pav	rus ment request ready to send	Processing	2/16/2006	
Pay \$15.00 to Starbucks by 2/16/2006 from Checking accou	nt							
Download latest cleared transactions and balances								
Cancel Help PIN Vault Schedule Updat	es	(	Update Now					

 If new transactions display in the Online Update Summary window, accept them into your Quicken account register → click Done in the Online Update Summary window.

# Thank you for making these important changes!

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