User Guide – Web Connect Download

Getting Started with Transaction Download via Web Connect to Quicken® or QuickBooks®

Refer to this guide for instructions on using Quicken/QuickBooks's online account services to save time and automatically keep your records up-to-date.

IMPORTANT NOTICES:

✓ Web Connect will only work with the Quicken or QuickBooks current version or two prior year versions for either Windows or Macintosh systems. Intuit discontinues the oldest version of its Windows products every year around the same time…**Quicken (April 30) & QuickBooks (May 31).**

✓ You must first access Web Connect from our bank's Internet Banking product. If you have performed at least one download from Internet Banking, follow the steps outlined in section two of this guide.

This guide includes the following sections:

Page 2: First Time: Set up a Quicken/QuickBooks Account and Download Transactions — explains how to use Express Setup to create a new Quicken/QuickBooks account and download transactions.

Page 3: Keeping your Quicken/QuickBooks Accounts Up-to-Date — explains how to download transactions on an ongoing basis.

Information You Will Need to Get Started

To download your transactions into Quicken/QuickBooks, you must have Internet access, then log into our bank's Internet Banking and export transactions using Web Connect to complete the setup.

This guide will show you how to setup and download your accounts. For step-by-step help with an online task, choose **About updating transactions and balances from my financial institutions** from the Quicken/QuickBooks **Help** menu.

Important: First, get the latest program updates!

To get the latest directory of participating financial institutions and program updates choose **Tools** menu > **One Step Update**, click **Update Now.** Quicken/QuickBooks will automatically check for available updates. When the update is complete, **exit** and **restart** Quicken/QuickBooks.

Our Bank's Quicken Brand Name: Landmark Bank, N.A.- MO OK TX

Special note to former QIF Import users

Quicken is making an important change to ensure security and the best customer experience for Internet Banking. After you update to a currently supported version of Quicken/QuickBooks, the QIF import will no longer be available. Quicken customers who import transactions from a financial institution's website with the QIF file format will need to switch to a supported Open Financial Exchange (OFX) download method (for example, Web Connect). It's easy to switch from QIF, simply follow the steps in the next section.

First Time: Setup a Quicken/QuickBooks Account and Download Transactions

The following steps explain how to activate your existing Quicken/QuickBooks account(s) or create one or more new Quicken/QuickBooks accounts for Web Connect online access.

Step 1   Log into the bank's Internet Banking, click on **History button (1st)**, click on **Export History button (2nd)**, select the **account to Export (3rd)**, click on the radio button for **either Quicken or QuickBooks (4th)**, and click on the **Submit button (5th)**.


Step 2   Depending on whether you choose Quicken or QuickBooks, the next screen will say "*To export the history information to Web Connect, press the "Download to Quicken/QuickBooks" button below. Your browser will then (after a short time) create the file, and launch Quicken®/QuickBooks®.*"

Click the respective button: **Download to Quicken** or **Download to QuickBooks**

Step 3   If you receive a **File Download** prompt to either open or save this file, click **Open** ➔

Step 4   If you have accounts already setup in Quicken/QuickBooks, you will receive a prompt to either **Create a new account** or **Link to an existing account**. Make the appropriate selection and click **Import**. ↓
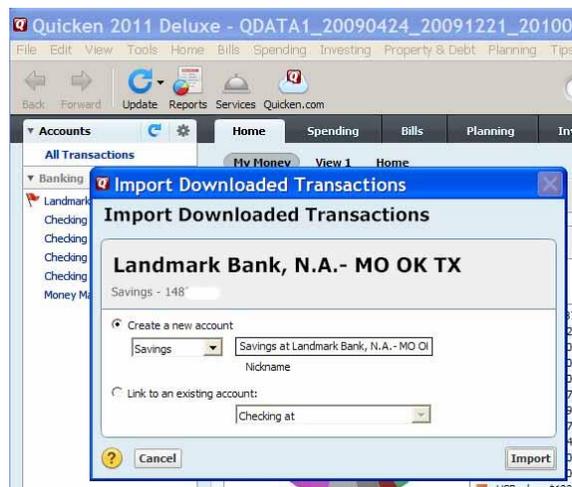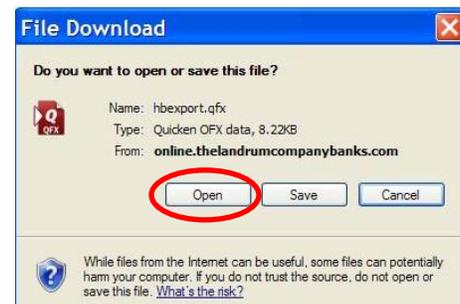

**Note:** You only need to select the account for this first download. After the account is activated for Web Connect, future transactions will automatically download to this account.

Step 5   When Quicken/QuickBooks confirms that the Web Connect data has been successfully downloaded, click **OK**. Your first download is complete. Refer to the following section to download transactions from now on.

Activating One Step Update to Automatically Keep Accounts Up-to-Date

One Step Update (also called "Express Web Connect") downloads transactions and balances for multiple accounts at the same financial institutions (or different institutions, if you have them activated too) all at once.

- **From within Internet Banking** (IB) – After following the steps above, the next time you export transactions using Web Connect from within our bank's Internet Banking, you will receive a prompt to **Activate One Step Update**. Choose **Yes** and fill in your Internet Banking credentials, then click **Activate**. ➜

  You will then be prompted to answer one of your Internet Banking PassMark challenge questions.
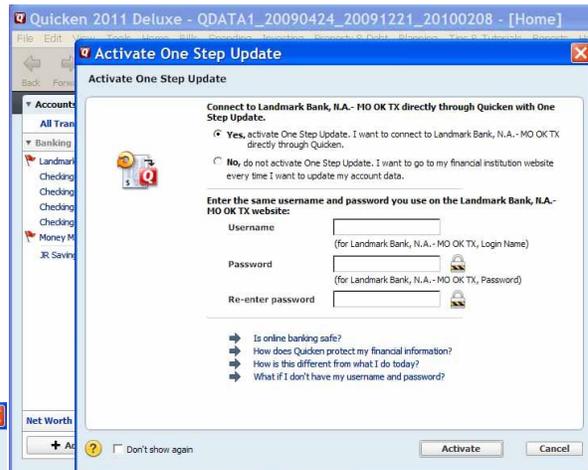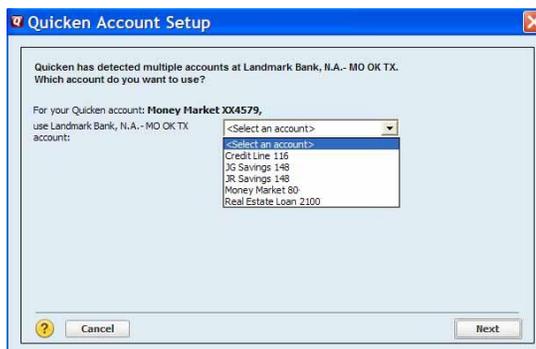
⬅ If you have multiple accounts within Internet Banking, you will be asked to select the account to link to this Quicken account. Select the account and click **Next**. Navigate through the Quicken screen prompts and click **Done**. Once the setup is complete, you will see a **One Step Update Summary** screen.

- **From within Quicken**, if accounts have either been setup manually or setup using the steps outlined on page 1, you can Activate One Step Update by following these steps:

  Step 1 Choose **Tools** > **Account List** > Look at the Transaction Download column

  - a. Accounts added to Quicken manually will say "No (Activate Downloads)"

  - b. Accounts added via Web Connect from within IB will say "Yes (Improve Connection)"

  - c. Accounts setup for One Step Update will say "Yes (Express Web Connect)"

  Step 2 Click on the [Edit] button for an account to activate for One Step Update

  Step 3 Click [Online Services] tab ➜

  Step 4 Click on the [Activate One Step Update] button ➜

  Step 5 Enter your Internet Banking credentials (Note: we do not recommend allowing Quicken to save your password)

  Step 6 You will then be prompted to answer one of your Internet Banking PassMark challenge questions.

  Step 7 Quicken will display all of the accounts it found within your IB that are not already setup for One Step Update. Select the appropriate actions for Quicken to either add, link to an existing account, or ignore. Click the [**Next**]
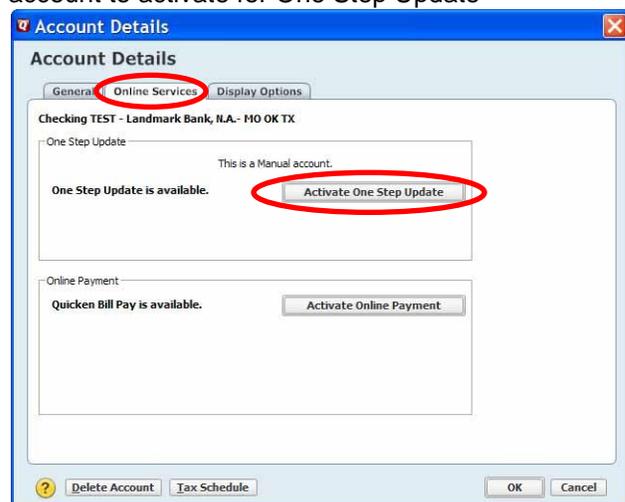
button. If the account you are trying to add already exists <u>and</u> has One Step Update activated, you will not be able to add it again.

Step 8 Once Quicken has completed the setup, you will receive an "Account Added" screen with the account name and how many transactions were downloaded. Click the [**Finish**] button.

Keeping Your Quicken/QuickBooks Accounts Up-to-Date

When you start Quicken, it should automatically check for any software updates. To update accounts setup for One Step Update, there are two options:

1) To update multiple accounts at one time, click the [Update] button in your toolbar, ➔ hover over "One Step Update", and click "Update All." You will be prompted for your IB password, if you did not allow Quicken to remember it.

2) To update a single account, click on that account in your Accounts window and click on the [Update Transactions] button on the Downloaded Transactions tab at the bottom of the screen. ⬇