

# Quicken® update instructions

## What you should know before starting the update

To complete these instructions and ensure the smooth transition of your data, you'll need your Synovus Online Banking/Synovus Business Banking Center user ID and password on hand.

Please perform the following instructions as described and in the order presented to ensure your Quicken service continues to function properly. The following instructions are specifically for Windows 2010-2013 users. **If you use a different software, you may need to follow a slightly different set of steps.** The update process should take about 15–30 minutes.

**NOTE:**

This update is time sensitive and should be completed before and after the scheduled maintenance.

## Documentation and Procedures for Web Connect (accessed within Synovus Online Banking/Synovus Business Internet Banking) and Express Web Connect (accessed directly via Quicken)

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### Task 1: Preparation

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1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Quicken Help**. Search for *Backup Data File* and follow the instructions.
2. **Optional step:** Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Quicken Help**. Search for *Update Software* and follow the instructions.

*To continue using online services and maintain access to live technical support from an Intuit representative, customers will need to upgrade to a currently supported version, such as Quicken Windows 2014 - 2016 or Quicken Mac 2016, Quicken Mac 2015, Quicken Mac 2007, or QuickBooks Windows/Mac 2014 - 2016.*

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### Task 2: Deactivate your account(s) prior to the start of the updates. You will re-activate these same accounts after the updates are complete.

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1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** or **Edit Details** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate** or **Remove from One Step Update**. Follow the prompts to confirm the deactivation.

**NOTE:** The name of the buttons referenced above vary depending on the services you currently use and the version of Quicken you are using.

5. Click on the **General** or **General Information** tab. Remove the **Account Number**.
6. Remove the name of the **Financial Institution**. Click **OK** to close the window.
7. Repeat steps 2—6 for each account

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**Task 3: Re-activate your account(s) via Synovus Online Banking/Synovus Business Internet Banking or Quicken after the updates are complete.**

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For Express Web Connect:

1. Open the account register that you want to enable for online account access.
2. Choose **Account Actions** menu > **Set Up Online**.
3. Enter **Synovus Online Banking/Synovus Business Internet Banking** and click **Next**.
4. Type your **User ID** and **Password**. Click **Connect**.

For Web Connect:

1. Click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.
2. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

**NOTE:** You may be presented with a security question from your Financial Institutions prior to receiving your accounts.

5. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link** or **Exists in Quicken** and select the matching accounts in the drop-down menu.

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

6. After all accounts have been matched, click **Next**.  
You will receive confirmation that your account(s) have been added.
7. Click **Done** or **Finish**.

***Thank you for making these important changes!***