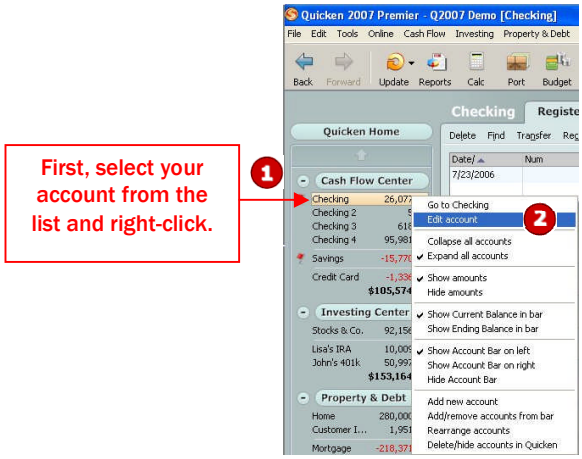
# Quicken® Personal Finance Software 2007-2008 for Windows®

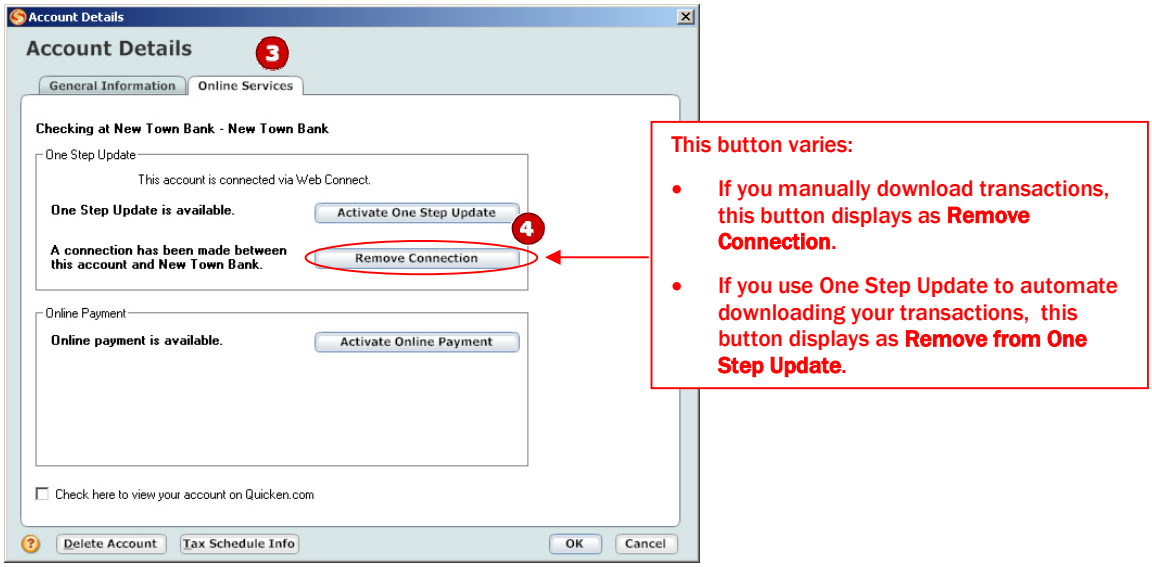
## Deactivating Web Connect and Reactivating Direct Connect

## DEACTIVATE YOUR ACCOUNTS

1. Right-click your first applicable account in the **Cash Flow Center**.
2. Select **Edit account** from the pop-up menu.




3. Click the **Online Services** tab.

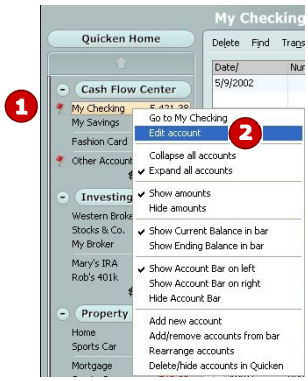



4. Click **Remove Connection** or **Remove from One Step Update** in the **One Step Update** area. Confirm the remaining prompts.
5. Click the **General Information** tab. In the **Financial Institution** field, type the financial institution name.Optionally, edit the **Account Name** field to reflect the new financial institution.
6. Click **OK** to close the **Account Details** dialog.

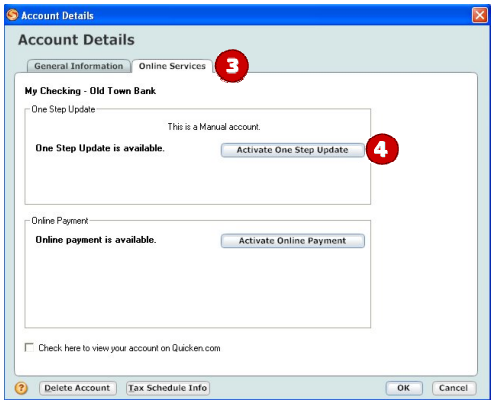
Repeat steps **1** through **6** for each account (such as checking, savings, credit cards, and brokerage). Verify that each account is deactivated by choosing **Tools** menu → **Account List**. As each online account is deactivated, the word **Activated** disappears for each account in the **Online Services** column.

## ACTIVATE YOUR ACCOUNTS

**IMPORTANT:** Complete section **E** *on or after* the conversion.




1. Right-click your first account in the **Cash Flow Center**.
2. Select **Edit account** from the pop-up menu.
3. Click the **Online Services** tab.




4. Click **Activate One Step Update** in the **One Step Update** area. Confirm the remaining prompts.
5. Follow the on-screen instructions, and enter the account information. If you have more than one account, then match each Quicken account to the appropriate account in the drop-down list, and complete the remaining prompts.

If you have more than six accounts, then repeat steps **1** through **5** for each additional set of six accounts that you use with online services.

## NEW FUNCTIONALITY WITH YOUR QUICKEN DIRECT CONNECT ACCOUNT

As a result of this account conversion, you now have the convenience of downloading directly within Quicken. Now, each time you perform an account download, you'll do a One Step Update rather than a Web site download. Choose **Online** menu → **One Step Update**. Click to select the download options you want, enter your financial institution's password, and click **Update Now**.

Your Direct Connect accounts may also offer new functionality and services such as online bill pay. Contact your financial institution for more information; see below for contact information.

**THANK YOU FOR MAKING THESE IMPORTANT CHANGES!**