

Quicken Conversion Instructions

As FirstCapital Bank completes its migration to Prosperity Bank, you will need to modify your Quicken settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for both Windows and Mac, and both connectivity types (Express Web Connect or Web Connect).

IMPORTANT: Express Web Connect will not be available until **5 business days** after May 15, 2023, so please utilize another connectivity type if you need transaction updates during this downtime. There is no delay for Web Connect or Direct Connect.

Quicken Windows Express Web Connect

On or before May 12, 2023:

1. Back up your Quicken Windows Data File. Go to File > Backup and Restore > Backup Quicken File.
2. Download the latest Quicken Update. Go to Help > Check for Updates.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

On or after May 15, 2023:

1. Deactivate online banking connection for accounts connected to FirstCapital Bank.
 - a. Choose Tools > Account List.
 - b. Click Edit on the account to deactivate.
 - c. In Account Details, click Online Services.
 - d. Click Deactivate. Follow prompts to confirm deactivation.
 - e. Click the General tab.
 - f. Delete Financial Institution and Account Number information. Click OK to close window.
 - g. Repeat steps for any additional accounts that apply.
2. Reconnect the online banking connection for your accounts.
 - a. Choose Tools > Account List.
 - b. Click Edit on the account you want to activate.
 - c. In Account Details, click Online Services and then choose Set up Now.
 - d. Type Prosperity Bank in the search field choose the appropriate service and click Next.
 - For Direct Connect – Select Prosperity Bank Direct

- For Express Web Connect – Select Prosperity Bank Web
- e. Enter your Prosperity Bank online banking credentials.

- Express Web Connect and Direct Connect use the same credentials you use for Prosperity Bank's online banking login.

Important: You will need to sign-in to Prosperity Bank online banking to establish your credentials before attempting to reconnect your accounts.

- f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select Link to an existing account and select the matching accounts in the drop-down menu.

Important: Do NOT choose "Create a new account" unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, choose Ignore – Don't Download into Quicken or click Cancel.

- g. After all accounts have been matched, click Next and then Done.

Quicken Mac Quicken Connect

On or before May 12, 2023:

1. Backup Quicken Mac Data File and Update the application.
 - a. Choose File > Save a Backup.
 - b. Download the latest Quicken Update. Choose Quicken > Check for Updates.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Accept all new transactions into the appropriate registers.

On or after May 15, 2023:

Activate the online banking connection for accounts connected to Prosperity Bank.

1. Click your account in the Accounts list on the left side.
2. Choose Accounts > Settings.
3. Select Set up transaction download.
4. Enter Prosperity Bank in the search field, choose the appropriate service, and click Continue.
 - For Direct Connect – Select Prosperity Bank Direct
 - For Quicken Connect – Select Prosperity Bank Web

5. Enter your Prosperity Bank online banking credentials.

- Express Web Connect and Direct Connect use the same credentials you use for Prosperity Bank's online banking login.

Important: You will need to sign-in to Prosperity Bank online banking to establish your credentials before attempting to reconnect your accounts.

6. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under Action, choose Link to pick your existing account.

Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.

7. Click Finish.

Quicken Windows Web Connect

On or before May 12, 2023:

1. Backup Quicken Windows Data File and Update.

- a. Choose File > Backup and Restore > Backup Quicken File.
- b. Download the latest Quicken Update. Choose Help > Check for Updates.

2. Complete a final transaction download.

- a. Complete last transaction update before the change to get all of your transaction history up to date.
- b. Repeat this step for each account you need to update.
- c. Accept all new transactions into the appropriate registers.

On or after May 15, 2023:

1. Deactivate online banking connection for accounts connected to FirstCapital Bank that is requesting this change.

- a. Choose Tools > Account List.
- b. Click Edit on the account to deactivate.
- c. In Account Details, click Online Services.
- d. Click Deactivate. Follow prompts to confirm deactivation.
- e. Click the General tab.
- f. Delete Financial Institution and Account Number information.

- g. Click OK to close window.
 - h. Repeat steps for any additional accounts.
- 2. Reconnect online banking connection for accounts that apply.
 - a. Download a Quicken Web Connect file Prosperity Bank's online banking site.
 - b. In Quicken, choose File > File Import > Web Connect (.QFX) File.
 - c. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
 - d. Choose Link to an existing account. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
 - e. Repeat this step for each account you have connected to this institution.

Quicken Mac Web Connect

On or before May 12, 2023:

- 1. Backup your Quicken Mac data file and update the application.
 - a. Choose File > Save a Backup.
 - b. Download the latest Quicken Update. Choose Quicken > Check for Updates.
- 2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Repeat this step for each account you need to update.
 - c. Accept all new transactions into the appropriate registers.

On the 2nd Action Date:

Activate online banking connection for accounts connected to Prosperity Bank.

- 1. Select your account under the Accounts list on the left side.
- 2. Choose Accounts > Settings.
- 3. Select Set up transaction download.
- 4. Enter Prosperity Bank in the search field, select Prosperity Bank Web, and click Continue.
- 5. Log into Prosperity Bank's online banking site and download your transactions to your computer.

Important: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

6. Drag and drop the downloaded file into the box titled Drop download file. Choose Web Connect for the “Connection Type” if prompted

7. In the “Accounts Found” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, click Link to pick your existing account.

Important: Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken.

8. Click Finish.