

## Quicken Conversion Instructions

As Lone Star State 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 Oct 28, 2024, 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 Oct 25, 2024:

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 Oct 28, 2024:

1. Deactivate online banking connection for accounts connected to Lone Star State 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**.
  - e. Enter your Prosperity Bank online banking credentials.
    - For Direct Connect – Select Prosperity Bank Direct
    - For Express Web Connect – Select Prosperity Bank Web

- 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 Oct 25, 2024:

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**.
3. 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 Oct 28, 2024:

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**.

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 Oct 25, 2024:

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 Oct 28, 2024:

1. Deactivate online banking connection for accounts connected to Lone Star State 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 Oct 25, 2024:

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**.