Digital Banking Upgrade
Quicken Instructions

Addition FINANCIAL

On July 23 our new Digital Banking will launch and 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).

These instructions refer to two "Action Dates." The 1st Action Date and 2nd Action Date.

1st Action Date – Tuesday, July 16, 2024
2nd Action Date – Tuesday, July 23, 2024

IMPORTANT: Express Web Connect will not be available until up to 5 business days after the 2nd Action Date, so please utilize another connectivity type if you need transaction updates during this downtime. There is no delay for Web Connect.

To navigate this document, just click the link or links below that match your product and connectivity:

Instructions for One-Step Update initiated from within Quicken

Instructions for Downloading a Web Connect file from your Digital Banking Site

Quicken Windows Express Web Connect

On the 1st Action Date:

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 the 2nd Action Date:

1. Deactivate your Digital Banking connection for accounts connected to Addition Financial.
    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 Addition Financial and Account Number information. Click **OK** to close window.
    g. Repeat steps for any additional accounts that apply.
2. Reconnect the Digital 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 Addition Financials' name in the search field and click Next.
    e. Enter your Addition Financial Digital Banking credentials.
        - Express Web Connect uses the same credentials you use for your Digital Banking login.

        Important: If your credentials do not work, contact Addition Financial.
    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 Express Web Connect

On the 1st Action Date:

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 the 2nd Action Date:

Activate the Digital Banking connection for accounts connected to Addition Financial.

1. Click your account in the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Addition Financials' name in the search field, select the correct option and click **Continue**.
5. Enter your Addition Financial Digital Banking credentials.
    - Express Web Connect uses the same credentials you use for your Addition Financial Digital Banking login.

    Important: If your credentials do not work, contact Addition Financial.
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 the 1st Action Date:

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 the 2nd Action Date:

1. Deactivate your Digital Banking connection for accounts connected to Addition Financial.
    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 Addition Financial and Account Number information.
    g. Click **OK** to close window.
    h. Repeat steps for any additional accounts.
2. Reconnect your Digital Banking connection for accounts that apply.
    a. Download a Quicken Web Connect file from Addition Financials' Digital 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 Addition Financial.

Quicken Mac Web Connect

On the 1st Action Date:

On the 1st Action Date:

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 Digital Banking connection for accounts connected to Addition Financial.

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Addition Financials' name in the search field, select the correct option and click **Continue**.
5. Log into Addition Financials' Digital 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**.