


Quicken® Personal Finance Software 2007 for Windows® Account Conversion Instructions

Glenview State Bank has completed the HOMEBankersm system conversion and you will need to modify your Quicken settings to ensure the smooth transition of your data.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online service may stop functioning properly. This conversion should take 10 minutes.

Note: In the following screen shots, red icon numbers match step number instructions. All financial institution and register information is fictitious and for illustration only.

 Within this guide, this symbol displays to indicate that there are optional FAQs.

A.

BACK UP YOUR CURRENT DATA

1. Choose **File** menu → **Backup**.
2. Specify which file to back up and where you want the backup saved in the **Quicken Backup** dialog, and then click **OK**.

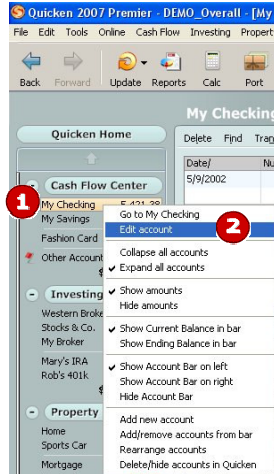
B.

DOWNLOAD THE LATEST QUICKEN UPDATE

1. Choose **Online** menu → **One Step Update**.
2. In the **One Step Update Settings** dialog, uncheck any boxes that are checked, and then click **Update Now**.
3. If a software update is available, then you will be prompted to apply it now.
4. Once the update is complete, restart Quicken.

1. *Quicken banking customers:* right-click your first GSB account from the list under **Cash Flow Center**.
2. Select **Edit account** from the pop-up menu.

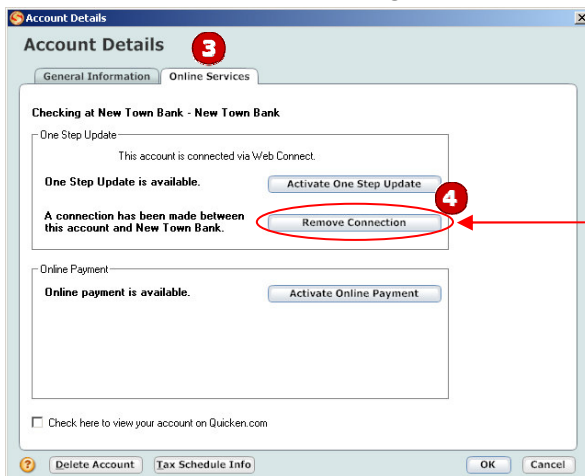
Banking Customers



Investing Customers



3. In the **Account Details** dialog, click the **Online Services** tab.



This button varies:

- If you manually download transactions, this button displays as **Remove Connection**.
- If you use One Step Update to automate downloading your transactions, this button displays as **Remove from One Step Update**.

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. If applicable, edit the **Account Name** field to reflect new financial institution.
 6. Click **OK** to close the **Account Details** dialog.
- Repeat steps **1** through **6** for each Glenview State Bank account from which you download transactions.

E.

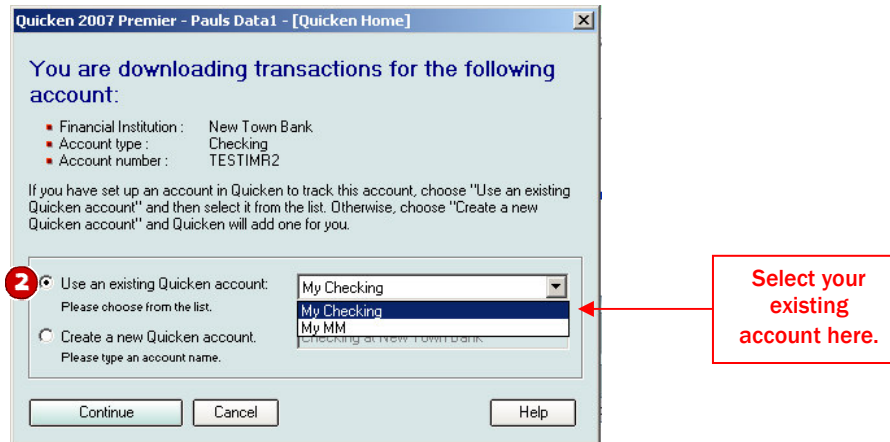
ACTIVATE YOUR ACCOUNTS



1. Open a Web browser and log in to the HOMEBankersm 2007 Web site. Download your transactions into Quicken.

Important: To avoid the possibility of creating duplicate records when downloading into Quicken, select a “from” date that is after June 19th, 2007 to download from GSB. You can select a date earlier than June 20, 2007 but Quicken will not recognize transactions previously downloaded and will duplicate them..

2. Click the **Use an existing Quicken account** radio button. In the corresponding drop-down list, select the Quicken account.



Repeat steps **1** and **2** for each account that you will use for online banking or investing.

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!