

Quicken® Personal Finance Software 2005–2007 for Windows® Account Conversion Instructions

As Glenview State Bank has completed the system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need to be able to log in to the HOMEBankersm Web site.

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.

In this document, Quicken 2006 screen shots display. While the screens may look slightly different depending upon version, the functionality remains the same. Any instructional differences are clearly noted.

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

A.

BACK UP YOUR CURRENT DATA

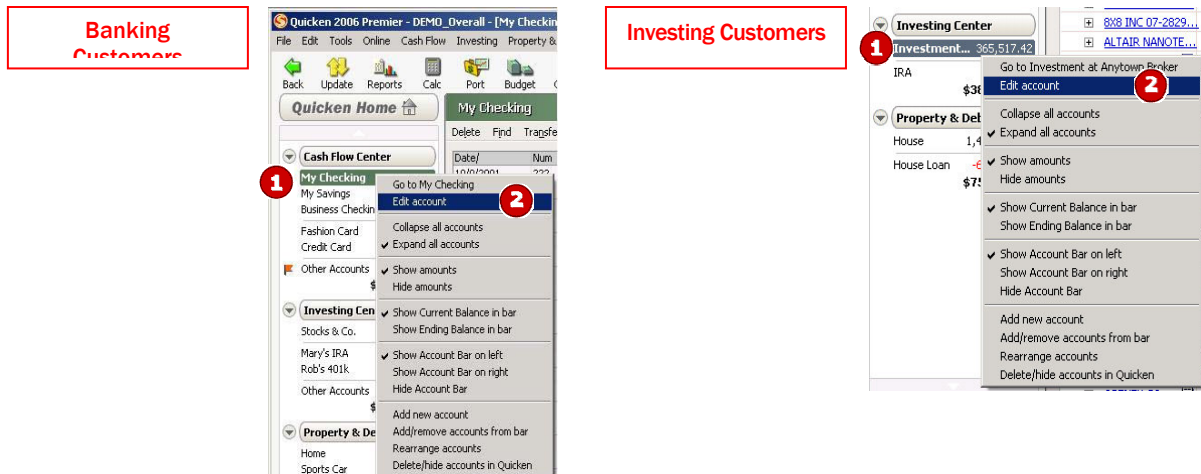
1. Choose **File** menu → **Backup**.
2. Specify which file to back up and where you want the backup saved in the **Quicken Backup** dialog, and then click **OK**.

B.

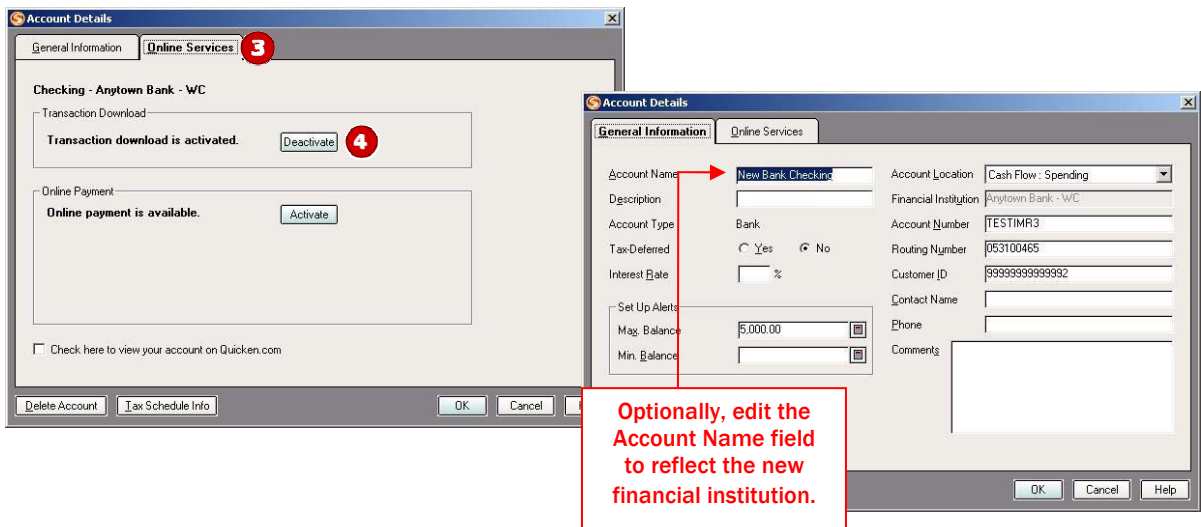
DOWNLOAD THE LATEST QUICKEN UPDATE

1. Choose **Online** menu → **One Step Update**.
2. In the **One Step Update** dialog, 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, **you must restart Quicken**.

1. *Quicken banking customers*: right-click on your first Glenview State Bank online account in the **Cash Flow**
2. Select **Edit account** from the pop-up menu.



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



4. Click **Deactivate** in the **Transaction Download** area. Confirm the remaining prompts.
5. Click **OK** to close the **Account Details** dialog (not shown).

Repeat steps **1** through **5** for each Glenview State Bank account from which you download transactions.

D.

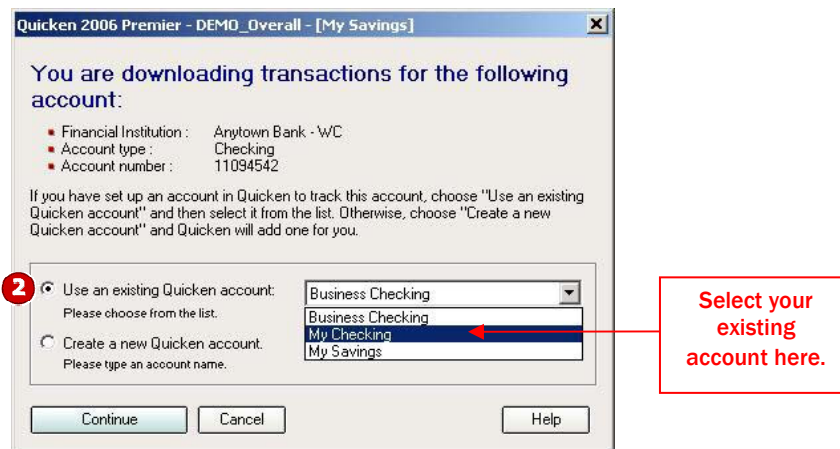
REACTIVATE YOUR ACCOUNTS



1. Log in to HOMEBankerSM 2007 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 applicable Quicken account.



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

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!