

Quicken Windows Web Connect

On the 1st Action Date Before 7:00pm on July 16:

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 First MyJFG Login on July 20:

1. Deactivate online banking connection for accounts connected to Johnson Financial Group's eBanking.
 - 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 Johnson Bank and Account Number information.
 - g. Click **OK** to close window.
 - h. Repeat steps for any additional accounts.
2. Activate MyJFG connection for your accounts at Johnson Financial Group.
 - a. Download a Quicken Web Connect file from MyJFG.
 - b. Click on an account tile, choose the downward arrow to export and choose Quicken (qfx).
 - c. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
 - d. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
 - e. 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.
 - f. Repeat this step for each account you have connected to this institution.

Quicken Mac Web Connect

On the 1st Action Date Before 7:00pm on July 16:

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 First MyJFG Login on July 20:

Activate MyJFG connection for accounts connected to Johnson Financial Group.

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Johnson Financial Group in the search field, select the correct option and click **Continue**.
5. Log into MyJFG and **click on an account tile**, choose the **downward arrow to export** and choose **Quicken (qfx)** to 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**.