

Attention QuickBooks and Quicken Users

The Online Banking upgrade will require that you make changes to your QuickBooks or Quicken software.

The conversion instructions reference two Action Dates. Please use the dates provided below:

1st Action Date: Friday, February 7, 2025

A data file backup and a final transaction download should be completed by this date. Please make sure to complete the final download before this date since transaction history might not be available after the upgrade.

2nd Action Date: Monday, February 10, 2025

This is the action date for the remaining steps in the conversion instructions. You will complete the deactivation/reactivation of your online banking connection to ensure that your current Quicken or QuickBooks accounts are set up with the new online banking connection.

Conversion Instructions

Below are links to conversion instructions, depending on the type of software that you use:

- Quicken – [view instructions](#)
- QuickBooks Desktop – [view instructions](#)
- QuickBooks Online – [view instructions](#)

Please carefully review your downloaded transactions after completing the migration instructions to ensure no transactions were duplicated or missed on the register.

IMPORTANT: Intuit aggregation services may be interrupted for up to 5 business days. Users are encouraged to download a QFX/QBO file during this outage. The following services may not work during the outage:

- Quicken Win/Mac Express Web Connect
- Quickbooks Online Express Web Connect