



QUICKEN WEB CONNECT TO WEB CONNECT

Post-Conversion Help Guide

**Please be sure to back-up your data file before proceeding with any of these steps.*

Duplicate transactions after completing reactivation

This is usually caused by overlapping the date range when importing the Web Connect file. Depending on the number of duplicate transactions imported, the best solution may be to restore the backup file created earlier in the conversion process. If there are not many transactions, they can be deleted prior to, or after accepting them to the register.

The most common occurrence will be that there are duplicate transactions. You may think your register is out of balance or that you are being asked to add an adjustment during reconciliation.

Specific steps/recommendations based on products are below:

Quicken for Windows

Note: This can also be caused by a preference that is available in Quicken for Windows, "Automatically add downloaded transactions to register." This step has been included in the conversion document, but may have been overlooked.

- If the transactions have not been accepted to the register, they can be deleted one by one prior to accepting.
- If the transactions have already been accepted to the register, they can be deleted one by one, or **multiple transactions** can be deleted at one time. If there are too many transactions to delete, or the steps to delete multiple transactions is difficult; restore a backup file. Ensure the correct date range is selected when importing the Web Connect file to the restored backup.

Express Web Connect only: Duplicate transactions may occur due to the 90 day look back when downloading transactions. These transactions need to be manually deleted from the register. They can be deleted one by one, or **multiple transactions** can be deleted at one time.

Quicken for Mac

- If the transactions have not been accepted to the register, they can be deleted one by one prior to accepting.
- If the transactions have already been accepted to the register, they can be deleted one by one from the register. If there are too many transactions to delete, restore a backup file. Ensure the correct date range is selected when importing the Web Connect file to the restored backup.

Quicken Connect only: Duplicate transactions may occur due to the 5 day look back when downloading transactions. These transactions need to be manually deleted from the register. They can only be deleted one by one

QuickBooks for Windows or Mac

- If the transactions have not been accepted to the register, they can be deleted one by one prior to accepting.
- If the transactions have already been accepted to the register, restore a backup file. Ensure the correct date range is selected when importing the Web Connect file to the restored backup.

Duplicate accounts after completing reactivation

There are two main reasons for this issue. "Create a new account" is selected when importing the Web Connect file, or you cannot find your account in the drop down menu and have created a new account. *If the account is not deactivated, it will not appear in the drop down menu.*

- First, confirm all accounts have been deactivated including hidden (Quicken), or inactive (QuickBooks) accounts.
- If they are, delete the duplicate account from the account list, then import the Web Connect file ensuring the "Use existing account" is selected, and select the correct account.
- If you cannot find your account in the drop down list, refer to Intuit connectivity support to assist further.

Activated the incorrect account during import of the Web Connect file

- Open the account register for the account that was linked incorrectly.
 - If the transactions have not been accepted to the register, they can be deleted one by one prior to accepting. After deleting the downloaded transactions, deactivate the account then import the Web Connect file ensuring "Use existing account" is selected and select the correct account.
 - If the transactions have already been accepted to the register, restore a backup file. Ensure the correct account to link to is selected, when importing the Web Connect file to the restored backup.

Unable to deactivate account

This may be caused by data issues with the file. After following the steps in the FAQs, attempt to deactivate the account. *If the issue still persists, refer to Intuit connectivity support to assist further.*

Click on the product name to view the FAQs on the support site.

[Quicken for Windows](#)

[Quicken for Mac 2005-2007](#)

[QuickBooks for Windows](#)

[QuickBooks for Mac](#)

If you are still having trouble with Quicken, please contact First Financial's Member Service Center at 866.750.0100 or email info@firstffcu.com.