Contents

Intuit - Quicken Reference Guide

Action Dates

As BankFirst completes its system conversion, you will need to modify your Quicken settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for both Windows and Mac, and all three connectivity types (Express Web Connect or Web Connect).

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

1st Action Date: Friday, November 14, 2025

2nd Action Date: Monday, November 17, 2025

IMPORTANT: Express Web Connect will not be available until Monday, November 24, 2025, so please utilize another connectivity type if you need transaction updates during this downtime. There is no delay for Web Connect.

Document Navigation

To navigate this document, just click the link below that matches your product connectivity:

Instructions for One-Step Update initiated from within Quicken:

Instructions for Downloading a Web Connect file from your Online Banking Site:

Rev. 11/05/2025 Member FDIC | EQUAL HOUSING LENDER

Quicken Windows Express Web Connect

Before Friday, November 14, 2025:

1. Back up your Quicken Windows Data File. Go to **File > Backup and Restore > Backup Quicken File**.

2. Download the latest Quicken Update. Go to **Help > Check for Updates**.

3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

On or after Monday, November 17, 2025:

1. Deactivate online banking connection for accounts connected to the financial institution that is requesting this change.

   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 Financial Institution and Account Number information. Click **OK** to close window.

   g. Repeat steps for any additional accounts that apply.

2. Reconnect the online banking connection for your accounts.

   a. Choose **Tools > Account List**.

   b. Click **Edit** on the account you want to activate.

   c. In Account Details, click **Online Services** and then choose **Set up Now**.

   d. Type your institution's name in the search field and click **Next**.

   e. Enter your BankFirst Online Banking credentials.
      Express Web Connect uses the same credentials you use for BankFirst Online Banking login.
      Important: If your credentials do not work, contact BankFirst.

   f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken.
      Select **Link to an existing account** and select the matching accounts in the drop-down menu.
      Important: Do NOT choose "Create a new account" unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, choose **Ignore – Don't Download into Quicken** or click **Cancel**.

   g. After all accounts have been matched, click **Next** and then **Done**.

Quicken Connect

Before Friday, November 14, 2025:

1. Back up 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. Accept all new transactions into the appropriate registers.

On or after Monday, November 17, 2025:
Activate the online banking connection for accounts connected to the financial institution that is requesting this change.

1. Click your account in the Accounts list on the left side.

2. Choose **Accounts > Settings**.

3. Select **Set up transaction download**.

4. Enter **BankFirst Financial Services** in the search field, select the correct option and click **Continue**.

5. Enter your financial institution credentials.
   Express Web Connect uses the same credentials you use for your institution's online banking login.
   Important: If your credentials do not work, contact BankFirst.

6. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under **Action**, choose **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.

7. Click **Finish**.

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Quicken Windows Web Connect

Before Friday, November 14, 2025:

1. Back up 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 or after Monday, November 17, 2025:

1. Deactivate online banking connection for accounts connected to the financial institution that is requesting this change.
   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 Financial Institution and Account Number information.
   g. Click **OK** to close window.
   h. Repeat steps for any additional accounts.

2. Reconnect online banking connection for accounts that apply.
   a. Download a Quicken Web Connect file from your financial institution's online banking site.
   b. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
   c. Use the import dialog to select the Web Connect file you downloaded. An "Import
   d. 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

Before Friday, November 14, 2025:

1. Back up 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 or after Monday, November 17, 2025:

Activate online banking connection for accounts connected to the financial institution that is requesting this change.

1. Select your account under the Accounts list on the left side.

2. Choose **Accounts > Settings**.

3. Select **Set up transaction download**.

4. Enter **BankFirst Financial Services** in the search field, select the correct option and click **Continue**.

5. Enter your BankFirst Online Banking login credentials. Quicken Mac Web Connect uses the same credentials you use for BankFirst Online Banking. **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 **Action**, 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**.