

PERSONAL QUICKEN® & QUICKBOOKS® USER INSTRUCTIONS:

Quicken® Users Information: Transfer your accounts in Quicken from the previous connection to the Sunflower Bank, N.A. Personal Online Banking connection. The instructions provided below may vary slightly between Quicken versions. Newly imported history will only be available from May 9, 2022 forward.

Deactivate Quicken Connection:

Quicken for Windows:

1. Select the **TOOLS** menu and select **ACCOUNT LIST**.
2. In the **ACCOUNT LIST**, select the account for which you want to deactivate online services and then click **EDIT**.
3. In the **ACCOUNT DETAILS** window, click the **ONLINE SERVICES** tab.
4. Click **DEACTIVATE** next to the service you want to disable.
5. Click **YES** to the message asking if you want to disable this service.
6. Click **OK** to the confirmation message.

Quicken for Mac:

1. Click on the account name in the bar down the side of Quicken Mac
2. Click the **SETTINGS** gear icon in the bottom-right corner
3. Click the **DOWNLOADS** tab
4. Click the **DISCONNECT** account button
5. Click **DONE**

Reactivate Quicken Connection:

To Reactivate Account(s) in Quicken for Windows:

1. Open the **ACCOUNT LIST** (CTRL+A)
2. Click the **EDIT** button on the account you want to reactivate.
3. Go to the **ONLINE SERVICES** tab and click the **SET UP NOW** button.
4. Type in **Sunflower Bank** and walk through wizard.
5. Choose **LINK** on the screen displayed after Quicken finds the available accounts at Sunflower Bank for your login credentials and carefully link to your existing Quicken account(s).

To Reactivate Account(s) in Quicken for Mac:

1. Click the account name in the list displayed down the side of Quicken to open the register.
2. Click the **SETTINGS** gear in the lower right corner of the register view.
3. Go to the **DOWNLOADS** tab.
4. Click the **CONNECT ACCOUNT** button.
5. Type in **Sunflower Bank** and walk through the wizard.
6. Choose **LINK** on the screen displayed after Quicken finds the available accounts at Sunflower Bank for your login credentials, and carefully link to your existing Quicken account(s).

QuickBooks® Users Information: Transfer your accounts in QuickBooks from the previous connection to the Sunflower Bank, N.A. connection. The instructions provided below may vary slightly for other versions. Newly-imported history will only be available from May 9, 2022 forward.

Deactivate QuickBooks Connection:

Step 1: Finish your online banking.

- Before deactivating Bank Feeds, make sure you match or delete all of the downloaded transactions for the account. QuickBooks won't let you make changes if there are still pending transactions.

Step 2: Deactivate Bank Feeds.

- You can disconnect your accounts from Bank Feeds one at a time.

QuickBooks Desktop for Windows:

1. Go to **LISTS** and then select **CHART OF ACCOUNTS**.
2. Right-click the account you want to deactivate. Then select **EDIT ACCOUNT**.
3. Go to the **BANK SETTINGS** tab.
4. Select **DEACTIVATE ALL ONLINE SERVICES** and then **OK** to confirm.
5. Select **SAVE & CLOSE**.

QuickBooks for Mac:

1. Go to **LISTS** and then select **CHART OF ACCOUNTS**.
2. Highlight the account and select the **PENCIL** icon to edit.
3. Select **ONLINE SETTINGS**.
4. In the **DOWNLOAD TRANSACTIONS** drop-down menu, select **NOT ENABLED**.
5. Select **OK** to confirm, then select **OK** to close the window.
6. After you disconnect your account, QuickBooks won't download new transactions.

When you deactivate bank feeds for an account, the lightning bolt (Windows) or blue circle (Mac) disappears beside the bank account's name in the Chart of Accounts. If you can still see it, this means Bank Feeds is still active for the account.

Reactivate QuickBooks Connection:

Connect your account to Bank Feeds

Web Connect (.QBO) files are online banking transactions from Sunflower Bank's website. The (.QBO) files can be downloaded and saved on your computer. Then, you can import the transactions so they become available in your Bank Feeds.

Web Connect Instructions

Before you start, find out from your bank if there's a fee or if the service is free.

1. From the **BANKING** menu. Select **BANK FEEDS**, then **IMPORT WEB CONNECT FILES**.
2. Select the .QBO files you saved, then select **OPEN**.
3. When prompted to select Bank Account, select:
 - **USE AN EXISTING QUICKBOOKS ACCOUNT** if the account you're importing transactions into is already set up in QuickBooks.
 - **CREATE A NEW QUICKBOOKS ACCOUNT** if the account you're importing transactions into isn't in QuickBooks yet.
4. Select **CONTINUE**. You'll see a dialogue box telling you that the data has been successfully read into QuickBooks.
5. Select **OK**.
6. Go to the **BANK FEEDS CENTER** to review your transactions.

Reconnect Accounts to QuickBooks

1. Go to the **BANKING** menu or **TRANSACTIONS** menu.
2. Select the **BANKING** tab.
3. Select **CONNECT ACCOUNT** on the landing page if this is your first time connecting, or select **ADD ACCOUNT** or **LINK ACCOUNT** if you've already created one.
4. Search for **Sunflower Bank**.
5. Select **CONTINUE**. Enter the username and password you use for Sunflower Bank's website in the window.
6. Follow the onscreen steps to connect. You may be prompted for additional security checks. It may take a few minutes to connect.
7. Select the bank account you want to connect (savings, checking). You should see all of your available accounts.
8. For each account you connect, select the matching account type from the dropdowns. These are accounts on your chart of accounts in QuickBooks.
9. Select how far back you want to download transactions.
10. Select **CONNECT**.
11. Go to the **BANKING** menu or **TRANSACTIONS** menu.
12. Select the **BANKING** tab.
13. Select **UPDATE**.