Quicken® 2007-2009 for Windows®

Account Conversion Instructions

Good news! Your upgrade to TreasuryPro is almost complete. All you need to do is modify the Quicken settings on each of your accounts to ensure the smooth transition of data. This update must be completed after you log in to the new online banking for the first time.

Please make sure you follow the instructions exactly as described and in the order presented. If you do not, Quicken may stop functioning properly. This conversion should take you about 10 minutes.

Note: In the following screen shots, red icon numbers match step number instructions. All bank and register information is fictitious and for illustration only.

A. BACK UP YOUR CURRENT DATA

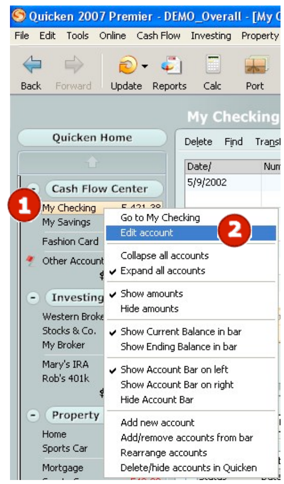
1. Choose **File** menu → **Backup**.
2. Specify which file to back up and where you want the backup saved in the Quicken Backup dialog, and then click **OK**.

B. DOWNLOAD THE LATEST QUICKEN UPDATE

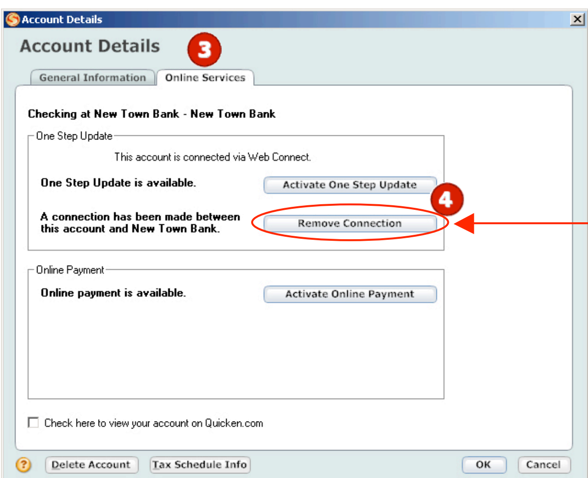
1. Choose **Online** menu → **One Step Update**.
2. In the One Step Update Settings dialog, uncheck any boxes that are checked, and then click **Update Now.**
3. If a software update is available, then you will be prompted to apply it now.
4. Once the update is complete, restart Quicken.

C. DEACTIVATE YOUR ACCOUNTS TO REMOVE THE OLD QUICKEN LINK

Important: You will not be able to proceed to the next section until you've accepted all transactions into your Quicken account register from your last download.



1. Right-click your first Umpqua Bank account from the list under Cash Flow Center.
2. Select **Edit account** from the pop-up menu.
3. In the Account Details dialog, click the **Online Services** tab.



This button varies:

- If you manually download transactions, this button displays as **Remove Connection**.
- If you use One Step Update to automate downloading your transactions, this button displays as **Remove from One Step Update**.

4. Click **Remove Connection** or **Remove from One Step Update** in the One Step Update area. Confirm the remaining prompts.
5. Click the **General Information** tab. In the Financial Institution field, type **Umpqua Bank Internet Banking.** Optionally, edit the Account Name field to reflect the new online banking system.
6. Click **OK** to close the Account Details dialog.

Repeat steps 1 through 6 for each Umpqua Bank account from which you download

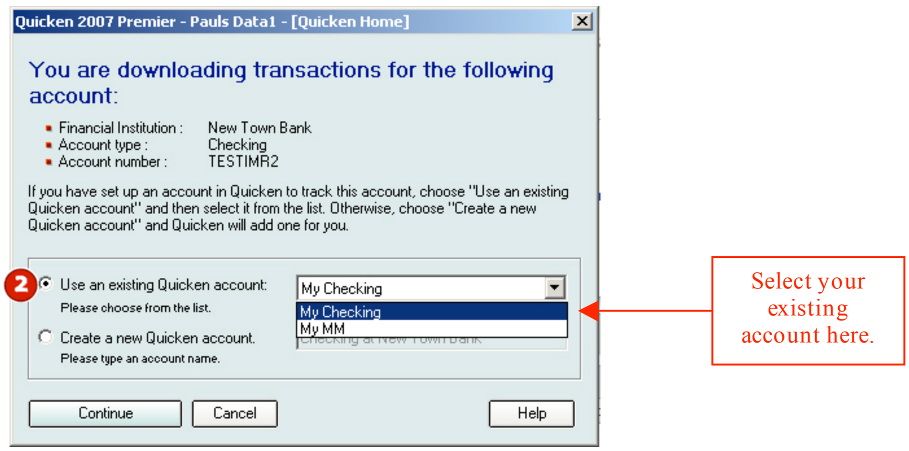
D. ACTIVATE YOUR ACCOUNTS FOR TREASURYPRO

IMPORTANT: Complete section **D** *during or after* your first login to the new system.

1. Anytime during or after your first login, download your transactions into Quicken. Download to Quicken

   Important: To avoid the possibility of creating duplicate records when downloading into Quicken, select a "from" date that does not include records previously downloaded.

2. Click the **Use an existing Quicken account** radio button. In the corresponding drop-down list, select the Quicken account that you used before.



Repeat steps 1 and 2 for each account that you will use for online banking.

E. AUTOMATING YOUR WEB CONNECT DOWNLOADS [OPTIONAL]

Express Web Connect provides the option of activating the One Step Update feature, which automates the downloading of Web Connect data. To activate the One Step Update feature, take either of these actions:

- If you see the Activate One Step Update prompt during the Web Connect download process, click **Yes**, and then click **Activate**.
- From Quicken, choose **Online** menu → **One Step Update**. In the dialog that displays, choose **Activate One Step Update** link next to Umpqua Bank Internet Banking.

Once activated, you can choose **Online** menu → **One Step Update** to perform downloads.

Look for information from Umpqua in Spring 2009 announcing our upgrade to Direct Connect!

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!

If you have any questions regarding these instructions, you can contact us at:

California	Oregon and Washington
1-866-563-1010 (toll-free)	1-877-511-3455 (toll-free)
7am-6pm (Pacific Time)	6am-6pm (Pacific Time)

You may also refer to: http://www.quicken.com/conversionfaqs to access *Quicken FAQs for Financial Institution Conversion Customers.*