

Web Connect Conversion Instructions Quicken Essentials for Mac 2010



As your financial institution completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need to be able to log in to the Web site.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online service may stop functioning properly.

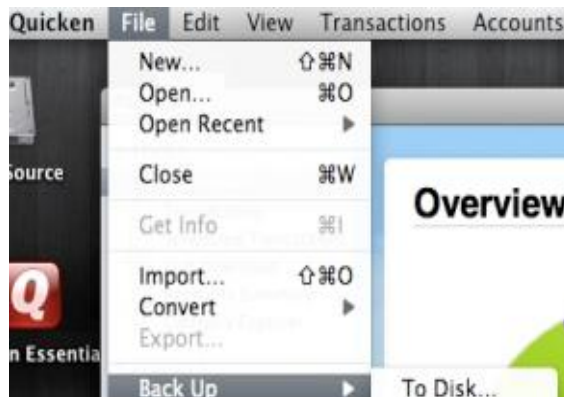


This update is time sensitive and should be started before 9:00 am on March 23, 2012.

The following steps should be completed prior to 9:00 am on March 23, 2012. This should be completed as close as possible to this deadline to minimize the need for manual entries.

Back Up Your Current Data

1. Click on File at the top tool bar → Back Up → To Disk
2. Choose a file name and location → click Save



Download the Latest Quicken Update

1. Click on Quicken at the top tool bar → select Check for Updates

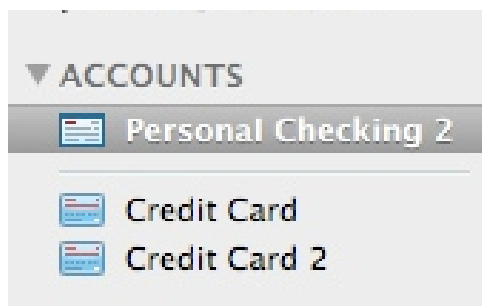


2. If a software update is available, you will be prompted to download the update.

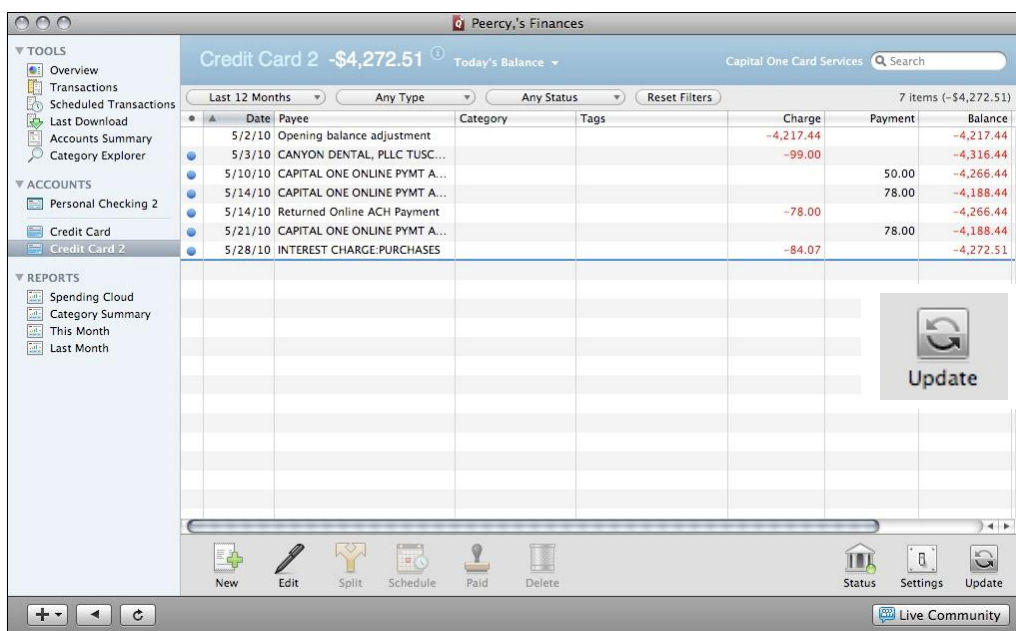


Get your Latest Transactions

1. Select account to be updated
2. Click Update
3. Log into your financial institution's web site and download the latest transactions.



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



4. Repeat steps 2 and 3 for each account that you will use for online banking and investing.
5. Once the transactions are downloaded, accept all transaction into your Quicken account from the Downloaded Transaction tab.



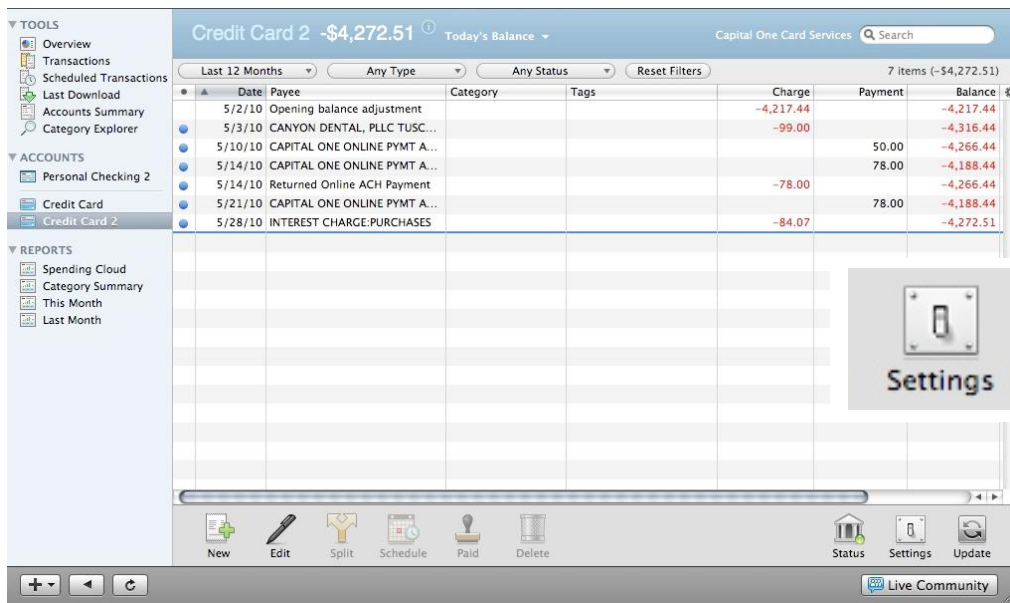
Important: You will not be able to proceed to the next section until you accept all transactions in the Download Transactions tab.



For help reconciling your account register, choose Help menu → Search for reconcile → select Reconcile Account

Deactivate your Account

1. Select the account you want to deactivate →click Settings.



2. In the “**At your financial institution**” section of the settings page, uncheck the “I want to download transactions” box. This will deactivate the online banking feature for this account. If you return to this screen you will see the financial institution is no longer listed

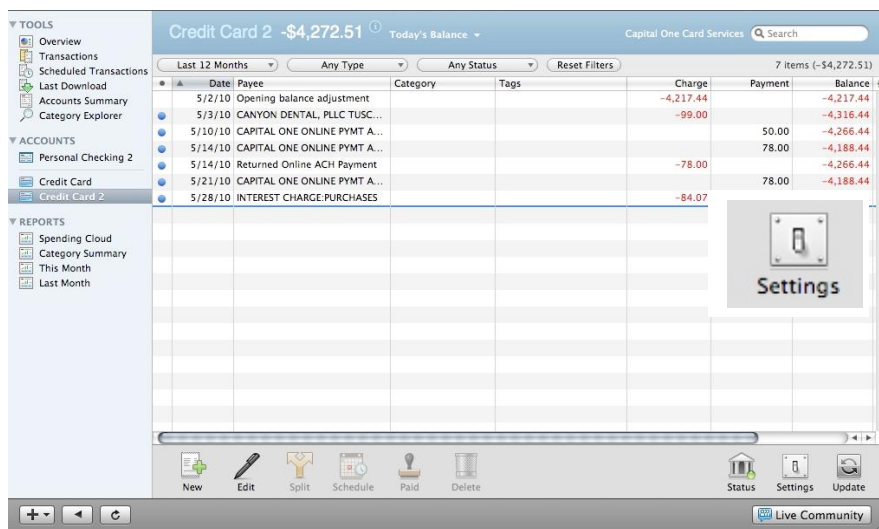


3. After you have made changes click Save to complete the deactivation process.
4. Repeat steps 1 through 3 for each online account.

The following steps should be completed after 8:00 am on March 26, 2012.

Activate your Account for Web Connect

1. Select your account and click Settings.



2. Check the "I want to download transactions" box.
3. Click the List button and select your financial institution

At your financial institution

I want to download transactions Assist Me...

Region: United States

Financial Institution: List...

Connection Type: Direct Connect

Customer ID:

Download start date: Download all available transactions
 Download transactions starting: 7/26/2010

Cancel Save

4. After selecting the proper financial institution from the list, change the Connection Type to Web Connect and click Save.
5. Log into your financial institution's web site and download the latest transactions.
6. Repeat steps 1 through 5 for each online account.

Congratulations, you have completed the necessary changes!