QUICKEN Essentials for Mac 2010® Web Connect Conversion Instructions

As your financial institution completes its system, 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 conversion should take 10 minutes.

This update is time sensitive and must be completed on or after 11/7/11.

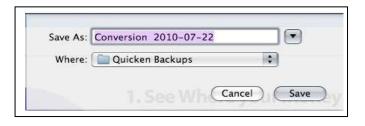
Note: In the following screen shots, red icon numbers match step number instructions. All financial institution and register information is fictitious and for illustration only.



Within this guide, this symbol displays to indicate that there are optional FAQs.

Back Up Your Data

- **1.** Click on File at the top tool bar \rightarrow Back Up \rightarrow To Disk
- 2. Choose a file name and location, Click Save





Downloading The Latest Quicken® Update

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



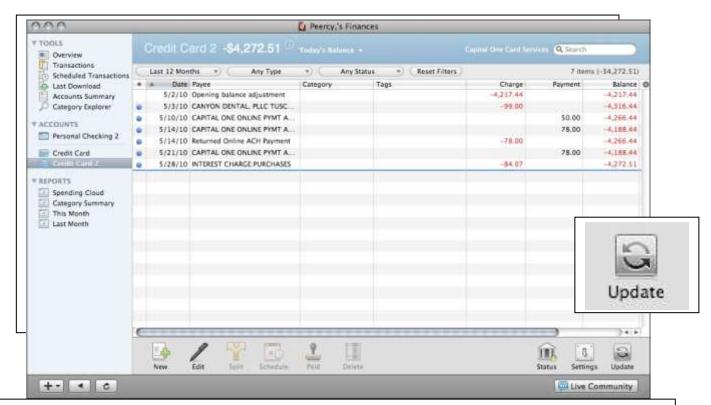
2. If a software update is available, you will be prompted to download the update; select Install Update to proceed.



Get Your Latest Transactions



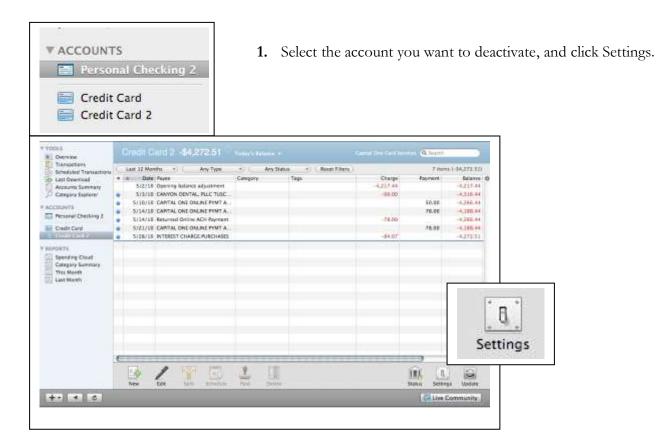
- 1. Select account to be updated
- 2. Click Update....
- **3.** Enter your customer ID and PIN to log into your financial institution's web site and download the latest transactions.
- ▲ Important: To avoid the possibility of creating duplicate records when downloading into Quicken, select a "from" date that does not include records previously downloaded.



Note: You may not be able to download these transactions after 11/11/11.

- **4.** Repeat steps 2 through 3 for each account (such as checking, savings, credit cards, and brokerage) that you will use for online banking and investing.
- 5. Once the transactions are downloaded, accept all the transactions into your Quicken account register.
- ▲ Important: You will not be able to proceed to the next section until you accept all transactions in the Download Transactions tab.

Deactivate Your Accounts



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

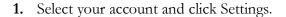


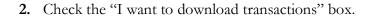
3. After you have made changes click Save to complete the deactivation process.

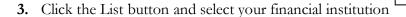
4. Repeat steps 1 through 3 for each online account (such as checking, savings, credit cards and brokerage).

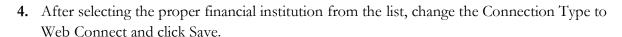
Reactivate Your Account for Web Connect

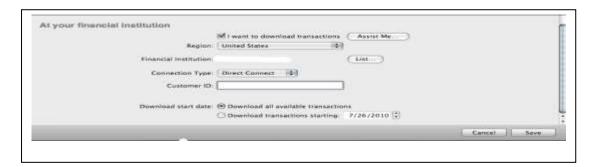
IMPORTANT: Complete the next on or after 11/7/11.











- **5.** Enter your customer ID and PIN to log into your financial institution's web site and download the latest transactions.
- **6.** Repeat steps 1 through 5 for each online account (such as checking, savings, credit cards and brokerage).

Thank you for making these important changes!