

Quicken Essentials and Quicken Mac 2015 Conversion Instructions

Quicken Essentials Mac 2010 and Quicken Mac 2015

Express Web Connect

Table of Contents

TABLE OF CONTENTS1

INTRODUCTION2

DOCUMENTATION AND PROCEDURES2

- Task 1: Conversion Preparation.....2
- Task 2: Deactivate Your Account(s) At First State Bank2
- Task 3: Re-activate Your Account(s) at First State Bank - Stratford.....2



Introduction

As **First State Bank** completes its system conversion you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your **[User ID and Password]** for the **First State Bank** website.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

NOTE: This update is time sensitive and can be completed 3-5 days after **12/18/2014**.

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up**, select **Backing up data files**, and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates**, select "Check for Updates," and follow the instructions.

Task 2: Deactivate Your Account(s) At First State Bank

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Remove the checkmark from **I want to download transactions**.
4. Click **Save**.
5. Click **Continue** when asked to confirm this deactivation.
6. Repeat steps 2 – 5 for each account at **First State Bank**.

Task 3: Re-activate Your Account(s) at First State Bank - Stratford

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

2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Check the box **I want to download transactions** and click **Assist me**.
4. Enter ***First State Bank - Stratford*** in the Search field and click **Continue**.
5. Type your **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

NOTE: Select "Quicken 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 the **Action** column, select "**Link**" to pick your existing account.

IMPORTANT: Do **NOT** select "**ADD**" under the action column.

8. Repeat step 7 for each additional account you wish to download into Quicken.
9. Click **Continue**.

Thank you for making these important changes!