Quicken for Mac Conversion Instructions

Quicken for Mac 2006-2007

Web Connect

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Introduction

As *[Financial Institution A]* completes its system conversion to *[Financial Institution B],* 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 *[Financial Institution A]* and *[Financial Institution B]* websites.

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 on or after *[Enter Date]*.

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 Your Data**," and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for *Updates*, select "**Checking for Updates to Quicken**," and follow the instructions.

Task 2: Connect to [Financial Institution A]

1. Choose **Online** menu > **Download Transactions.**

2. Select your account from the drop-down list.

3. Click **Download** to access *[Financial Institution A]* website at *[Financial Institution A URL]*.

4. Enter your **Customer ID** and **PIN** to login to the *[Financial Institution A]* web site. Download your transactions through *[Conversion Date]* into Quicken.

5. Repeat the download process for each account you have at *[Financial Institution A]* (such as checking, savings, credit cards and brokerage).

6. Once all accounts have been downloaded, accept all transactions into your Quicken account registers.

Task 3: Deactivate Your Account(s) At [Financial Institution A]

1. Choose **Lists** menu > **Accounts**.

2. Select the account that you want to disable and click **Edit**.

3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.

4. Remove the information within the **Account Number** and **Routing Number** fields.

5. Click **OK** to save your edits.

6. Repeat steps 2 – 5 for each account at *[Financial Institution A]*.

7. Verify that your account list does not display a blue online circle icon for any accounts at *[Financial Institution A]*.

Task 4: Re-activate Your Account(s) at [Financial Institution B]

1. Log into the *[Financial Institution B]* website at *[Financial Institution B URL]*.

2. Download and import your transactions to Quicken.

3. Click the **Use an existing account** radio button.

4. Select the corresponding existing Quicken account in the drop-down list and click **OK**.

5. Repeat steps 3-4 for all accounts at *[Financial Institution B]*.

6. Choose **Lists** menu > Accounts. Verify that each account at *[Financial Institution B]* has a blue online circle indicating that it has been reactivated for online services.

Thank you for making these important changes!