Web Connect Conversion Instructions
Quicken for Mac 2005-2007

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 into 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 15-20 minutes.

This update is time sensitive and can be completed on or after **October 10, 2011**.

Back Up Your Current Data

1. **(2006 and 200**7) Choose File menu → Back Up → To Disk
   (2005) Choose File menu → Save a Copy
2. Complete the following prompts

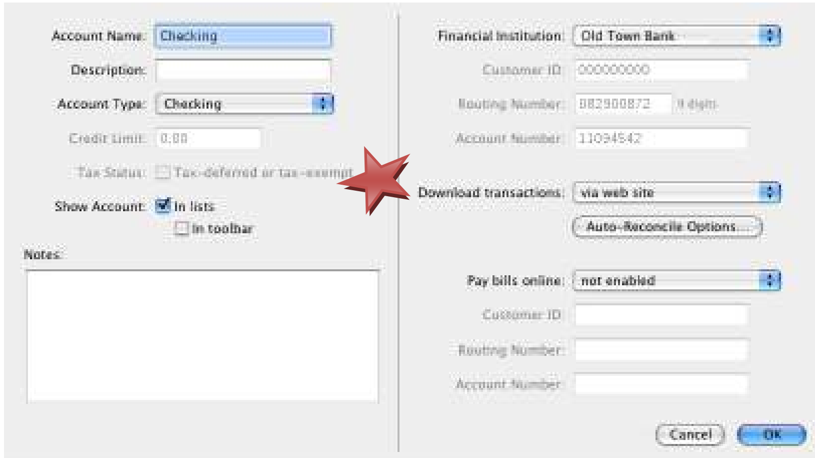
Download the Latest Quicken Update

1. **(2007)**Choose Quicken 2007 menu → Check for Updates.
   (2006) Choose Quicken 2006 menu → Check for Updates.
   (2005) Choose Quicken 2005 menu → Check for Updates.
2. If a software update is available, then you will be prompted to download the update from the Quicken Web site.
3. Once the update is complete close and reopen Quicken

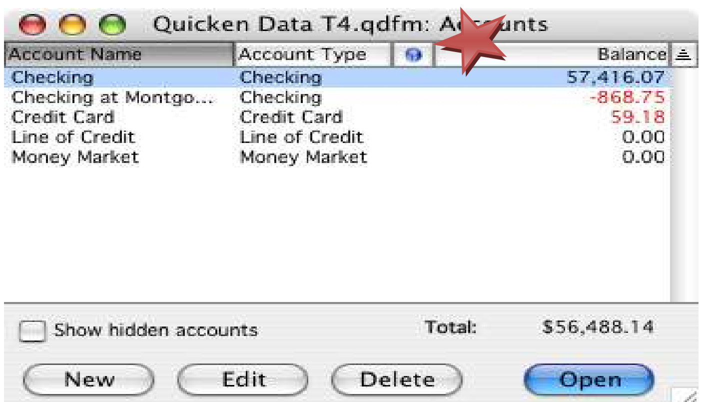
Deactivate your Account

1. Choose Lists menu → Accounts.
2. Select the account you want to disable → click Edit.

3. In the Download transactions: drop-down list, select not enabled → click OK to the prompt "You are about to disable…"



4. Click OK to save your edits.
5. Repeat steps 2 through 4 for each online account. As each online account is disabled, its blue online circle icon will disappear. Verify that your account list does not display blue online circle icons for any accounts that you have disabled.



Activate your Account for Web Connect

1. Log into your financial institution's web site. Download your transactions into Quicken.
2. Be sure to click the "Use an existing Quicken account" radio button**.** In the corresponding drop-down list, select the Quicken account that you wish to use.

3. Repeat steps 1 and 2 for each online account.

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

Congratulations, you have completed the necessary changes!