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 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. 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

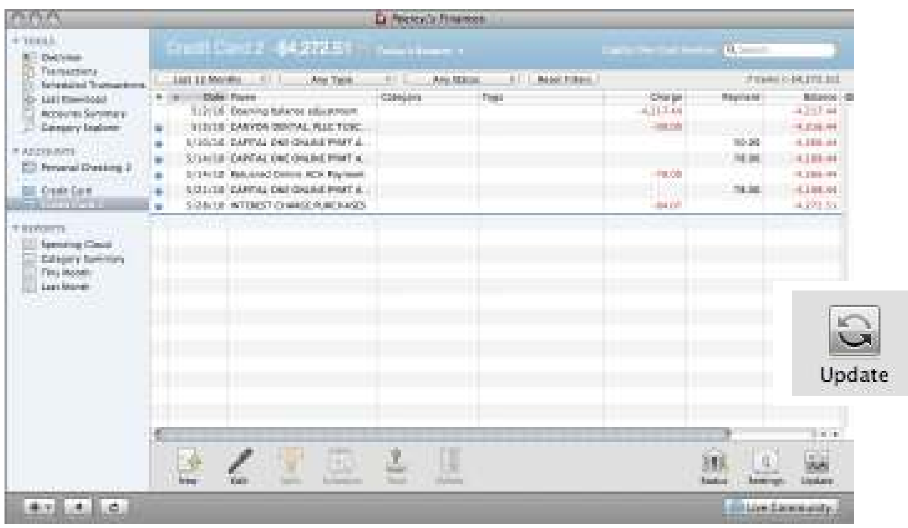
2. If a software update is available, you will be prompted to download the update.

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.

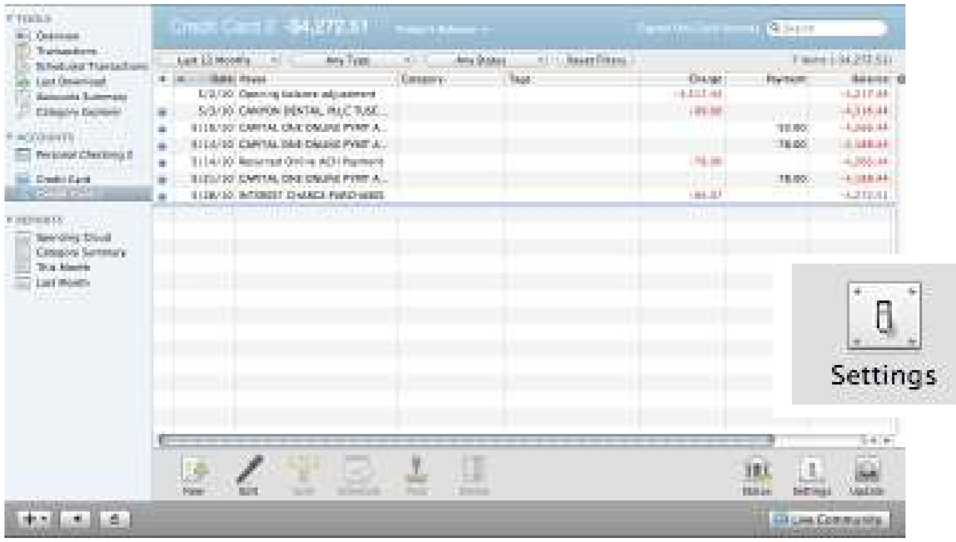
5. Once the transactions are downloaded, accept all transaction into your Quicken account from the Downloaded Transaction tab.

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.

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

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!