Quicken Essentials for Mac Conversion Instructions

Quicken Essentials for Mac 2010

Express Web Connect

Table of Contents

Table of Contents 1

Introduction 2

Documentation and Procedures 2

Task 1: Conversion Preparation 2

Task 2: Connect to Suburban Bank and Trust 2

Task 3: Deactivate Your Account(s) At Suburban Bank and Trust 2

Task 4: Re-activate Your Account(s) at Wheaton Bank and Trust 3

Introduction

As Suburban Bank and Trust completes its system conversion to Wheaton Bank and Trust, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your customer ID and PIN for the Suburban Bank and Trust and Wheaton Bank and Trust 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.

This update is time sensitive. Tasks 1-3 can be completed on or before Friday, November 13th. Task 4 can be completed on or after Monday, November 16th.

Documentation and Procedures

1. Conversion Preparation
2. 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.
3. 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.
4. Connect to Suburban Bank and Trust
5. Select your account under the “**Accounts**” list on the left side.
6. Choose **Accounts** menu > **Update Selected Online Account**.
7. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.
8. Deactivate Your Account(s) At Suburban Bank and Trust
9. Select your account under the “**Accounts**” list on the left side.
10. Choose **Accounts** menu > **Settings**.
11. Remove the checkmark from “**I want to download transactions**”.
12. Click **Save**.
13. Click **Continue** when asked to confirm this deactivation.
14. Repeat steps 2 – 5 for each account at Suburban Bank and Trust.
15. Re-activate Your Account(s) at Wheaton Bank and Trust
16. Select your account under the **Accounts** list on the left side.
17. Choose **Accounts** menu > **Update Selected Online Account**.
18. Click **List** menu > Select Wheaton Bank and Trust.
19. Click **Continue**.
20. Select “Quicken Connect” for the “Connection Type” if prompted.
21. Enter your Login Credentials for Wheaton Bank and Trust.
22. Click **Continue**.
23. In the “Choose your Accounts” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select your existing account, and each additional account you wish to download into Quicken Essentials.
24. Do **NOT** select “**ADD**” under the action column.
25. Click **Continue**.

Thank you for making these important changes!