

Quicken for Mac Conversion Instructions



Quicken for Mac 2015-2016

Express Web Connect

Introduction

As **Crockett National Bank** completes its online banking conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your former **User ID, Password, and Security Question Answers** for Crockett National Bank's online banking and your updated Username, Password, and Security Question Answers post launch.

NOTE: Quicken Express Web Connect accounts use the same User ID and PIN/Password as **Crockett National Bank's iBanking**.

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.

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 **Crockett National Bank** on or after **August 8, 2016**

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Troubleshooting** > **Deactivate Downloads**.
4. Repeat steps for each account at **Crockett National Bank**.

Task 3: Reactivate Your Account(s) at **Crockett National Bank** on or after **August 8, 2016**

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download**.
4. Enter Crockett National Bank in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Enter your **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

NOTE: Select "Express Web Connect" or "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. Select **Finish**.

Thank you for making these important changes!