

Quicken for Mac Conversion Instructions

Express Web Connect

Introduction

As your financial institution completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data.

To complete these instructions, you will need your login credentials for online banking.

NOTE: Quicken Express Web Connect uses the same User ID and Password as your financial institution's website.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. Go to **File > Save a Backup**
2. Download the latest Quicken Update. Go to **Quicken > Check for Updates**

Task 2: Complete a final transaction download

If new transactions were received from your connection, accept all new transactions into the appropriate registers.

1. Complete a final transaction update to update your transaction history.
2. Repeat this process for each account you need to update.
3. Accept all new transactions into the appropriate registers. This step is required.

Task 3: Disconnect Accounts in Quicken

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 **First Mid Bank & Trust** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Enter your online banking credentials 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**.