First Mid BANK & TRUST

Quicken for Mac Conversion Instructions

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.

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 before the change to get all of your transaction history up to date.
2. Repeat this process for each account you need to update.
3. Accept all new transactions into the appropriate registers.

Task 3: Connect Accounts at ***First Mid Bank & Trust***

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. Log in to your online banking site and **Download** a file of your transactions to your computer.

NOTE: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

6. Drag and drop the downloaded file into the box **Drop download file**.

NOTE: Select "Web 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 unless you intend to add a new account to Quicken.

8. Click **Finish**.
9. Repeat steps for each account to be connected.