BANK

Quicken Mac Express Web Connect

On the 1st Action Date:

1. Backup Quicken Mac Data File and Update the application.
   a. Choose **File > Save a Backup**.
   b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
   a. Complete last transaction update before the change to get all of your transaction history up to date.
   b. Accept all new transactions into the appropriate registers.

On the 2nd action Date:

1. Deactivate online banking connection for accounts connected to Bank3.
   a. Choose **Tools > Account List**.
   b. Click **Edit** on the account to deactivate.
   c. In Account Details, click **Online Services**.
   d. Click **Deactivate**. Follow prompts to confirm deactivation.
   e. Click the **General** tab.
   f. Delete Financial Institution and Account Number information. Click **OK** to close window.
   g. Repeat steps for any additional accounts that apply.

On the 3rd Action Date:

Activate the online banking connection for accounts connected to Bank3.

1. Click your account in the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Bank3 in the search field, select the correct option and click **Continue**.
5. Enter your financial institution credentials.

   Important: If your credentials do not work, contact your financial institution.

6. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under **Action**, choose **Link** to pick your existing account.

   Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.

7. Click **Finish**