BANK

Quicken Mac Web Connect

On the 1st Action Date:

1. Backup your 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. Repeat this step for each account you need to update.
   c. 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 online banking connection for accounts connected to Bank3.

1. Select your account under 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. Log into Bank3's online banking site and download your transactions to your computer.

Important: 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 titled **Drop download file**. Choose **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, click **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.

8. Click **Finish**.