Quicken Essentials for Mac Conversion Instructions

Quicken Essentials for Mac 2010

Web Connect to Express Web Connect

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Introduction

As ***KeyWorth Bank*** 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 customer ID and PASSWORD for the ***KeyWorth Bank*** website.

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.

NOTE:	This update is time sensitive and can be completed on or after ***01/28/2012***

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: Connect to KeyWorth Bank

1. Log in to ***KeyWorth Bank*** web site at ***http://www.keyworthbank.com.***
2. Download your transactions into Quicken.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Deactivate Your Account(s) At KeyWorth Bank

1. Select your account under the "**Accounts**" list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Remove the checkmark from "**I want to download transactions**".
4. Click **Save**.
5. Click **Continue** when asked to confirm this deactivation.
6. Repeat steps 2 – 5 for each account at ***KeyWorth Bank.***

Task 4: Re-activate Your Account(s) at KeyWorth Bank

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Click **List** menu > Select ***KeyWorth Bank***.
4. Click **Continue**.

NOTE:	Select "Quicken Connect" for the "Connection Type" if prompted.

5. Enter your Login Credentials for ***KeyWorth Bank.***
6. Click **Continue**.
7. In the "Choose your Accounts" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select your existing account, and each additional account you wish to download into Quicken Essentials.

IMPORTANT:	Do **NOT** select "**ADD**" under the action column.

8. Click **Continue**.

Thank you for making these important changes!