Quicken Essentials and Quicken Mac 2015 Conversion Instructions

Quicken Essentials and Quicken Mac 2015

Web Connect to Express Web Connect

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[Insert Your Logo Here]

Introduction

As ***First Madison Bank & Trust*** 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 ***[User ID and Password]*** for the ***First Madison Bank & Trust*** 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 ***02/24/15***.

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 First Madison Bank & Trust

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Enter ***First Madison Bank & Trust*** in the Search field and click **Continue**.
4. Log in to ***First Madison Bank & Trust*** web site at www.firstmadisonbank.com
5. **Download** a file of 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 **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.

8. Click **Continue**.

Task 3: Deactivate Your Account(s) At First Madison Bank & Trust

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 ***First Madison Bank & Trust.***

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

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Check the box **I want to download transactions** and click **Assist me**.
4. Enter ***First Madison Bank*** in the Search field and click **Continue**.
5. Type your **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

NOTE:	Select "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. Repeat step 7 for each additional account you wish to download into Quicken.
9. Click **Continue**.

Thank you for making these important changes!