Quicken Essentials and Quicken Mac 2015 Conversion Instructions

Quicken Essentials and Quicken Mac 2015

Express Web Connect

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Introduction

As ***Community Bank of Missouri*** completes its online banking 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 ID and Password*** for the ***Community Bank of Missouri*** 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 ***January 21, 2015***.

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: Deactivate Your Account(s) At Community Bank of Missouri

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 ***Community Bank of Missouri.***

Task 3: Re-activate Your Account(s) at Community Bank of Missouri

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 ***Community Bank of Missouri*** 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!