Quicken Essentials and Quicken Mac 2015 Conversion Instructions

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Web Connect

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Introduction

As *Volunteer State Bank* 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 *User ID and Password* for the *Volunteer State Bank* online banking 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 *05/05/15*.

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:   Deactivate Your Account(s) At Volunteer State 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 *Volunteer State Bank.*

Task 3:   Re-activate Your Account(s) at Volunteer State Bank

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Update Selected Online Account**.

3. Enter *Volunteer State Bank* in the Search field and click **Continue**.

4. Log in to *Volunteer State Banks* online banking website at ***www.volstatebank.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**.

Thank you for making these important changes!