Quicken for Mac Conversion Instructions

Quicken for Mac 2006-2007

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 websites.

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 Your Data**," and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for *Updates*, select "**Checking for Updates to Quicken**," and follow the instructions.

Task 2:   Deactivate Your Account(s) At Volunteer State Bank

1. Choose **Lists** menu > **Accounts**.

2. Select the account that you want to disable and click **Edit**.

3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.

4. Remove the information within the **Account Number** and **Routing Number** fields.

5. Click **OK** to save your edits.

6. Repeat steps 2 – 5 for each account at *Volunteer State Bank*.

7. Verify that your account list does not display a blue online circle icon for any accounts at *Volunteer State Bank*.

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

1. Log into the *Volunteer State Banks* online banking website at *www.volstatebank.com*.

2. Download and import your transactions to Quicken.

3. Click the **Use an existing account** radio button.

4. Select the corresponding existing Quicken account in the drop-down list and click **OK**.

5. Repeat steps 3-4 for all accounts at *Volunteer State Bank*.

6. Choose **Lists** menu > Accounts. Verify that each account at *Volunteer State Bank* has a blue online circle indicating that it has been reactivated for online services.

Thank you for making these important changes!