

Quicken for Mac Conversion Instructions

Quicken for Mac 2005-2007

Web Connect

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Introduction

As **First State 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 State Bank & Trust** Internet Banking System.

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 **June 23, 2014**.

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 First State Bank & Trust, KS

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

Task 3: Re-activate Your Account(s) at First State Bank & Trust, KS

1. Log into the **First State Bank and Trust** Internet Banking System at **www.firststateks.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 **First State Bank & Trust, KS**.
6. Choose **Lists** menu > Accounts. Verify that each account at **First State Bank & Trust** has a blue online circle indicating that it has been reactivated for online services.

NOTE: Duplicate Transactions – There is a possibility that you may experience duplicate transactions in your register after account reactivation. This is usually caused by the user overlapping the date range when importing the Web Connect file. Depending on the number of duplicate transactions imported, the best solution may be to restore the backup file created earlier in the conversion process. If there are not many transactions, they can be deleted prior to, or after accepting them to the register.

NOTE: This can also be caused by a preference that is available in Quicken for Windows, “Automatically add downloaded transactions to register”.

NOTE: Specific steps/recommendations based on products can be found in the Post Conversion Issue Help Guide.

Thank you for making these important changes!