Quicken for Mac Conversion Instructions

Web Connect to Express Web Connect

Introduction

As ***State Bank of Southern Utah*** completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your login credentials for online banking.

You should perform the following instructions exactly as described and in the exact order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

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: ***Optional task*** - Complete a final download **before *June 20, 2020***

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Sign in to online banking and download transactions for an account.
4. Import the transactions.
5. Repeat this step for each account that you use for online banking or investing.

Task 3: Connect Accounts to ***State Bank of Southern Utah WC New*** on or after ***June 30, 2020***

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 ***State Bank of Southern Utah WC New*** in the **Search** field, select the name in the **Results** list 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**.