

# Quicken Essentials for Mac Conversion Instructions

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## *Quicken Essentials for Mac 2010*

### *Direct Connect*

As **Essex Savings Bank** completes its online banking update, 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 **Essex Savings Bank** 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 **[8/12/2014]**.

## Documentation and Procedures

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### **Task 1: Conversion Preparation**

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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.

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### **Task 2: Connect to Essex Savings Bank**

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1. Select your account under the "**Accounts**" list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

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### **Task 3: Deactivate Your Account(s) At Essex Savings Bank**

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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 **Essex Savings Bank**.

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**Task 4: Re-activate Your Account(s) at Essex Savings Bank**

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1. Select your account under the "**Accounts**" list on the left side.
2. Choose Accounts menu > "Update Selected Online Account".
3. Click "List" > Select **Essex Savings Bank**.
4. Click "**Continue**".

**NOTE:** Select "Direct Connect" for the "Connection Type" if prompted.

5. Enter your **Login Credentials** for **Essex Savings Bank**.
6. In the "Choose your Accounts" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, you will want to select your existing account.

**IMPORTANT:** Do NOT select "ADD" under the action column.

7. Repeat step 6 for each additional account you wish to download into Quicken Essentials.
8. Click "**Save**".

**Thank you for making these important changes!**