

Quicken for Mac Conversion Instructions



Quicken for Mac 2015

Express Web Connect

Introduction

As **Garfield County Bank and Redwater Valley Bank** complete their system conversion to FPS-Gold, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your **User ID and Password** for the **Garfield County Bank or Redwater Valley Bank** internet banking website.

NOTE: Quicken Web Connect/Express Web Connect accounts use the same User ID and PIN/Password as **Garfield County Bank** or **Redwater Valley 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.

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 **Garfield County Bank or Redwater Valley Bank** on or after **November 2, 2015**.

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 *Garfield County Bank or Redwater Valley Bank*.

Task 3: Re-activate Your Account(s) at *Garfield County Bank or Redwater Valley Bank* on or after **November 2, 2015**.

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 *Garfield County Bank* in the Search field 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**.

Thank you for making these important changes!