Quicken for Mac Conversion Instructions

Quicken for Mac

Web Connect

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Introduction

As your current financial institution completes its system conversion to *Seacoast Bank,* 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 your current financial institution and *Seacoast Bank* *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.

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: Connect to Your Old Financial Institution.

1. Choose **Online** menu > **Download Transactions.**

2. Select your account from the drop-down list.

3. Click **Download** to access your current financial institutions website.

4. Enter your **Customer ID** and **PIN** to login to your current financial institutions web site. Download your transactions into Quicken.

5. Repeat the download process for each account you have at your current financial institution (such as checking, savings, credit cards and brokerage).

6. Once all accounts have been downloaded, accept all transactions into your Quicken account registers.

Task 3: Deactivate Your Account(s) at Your Current Financial Institution.

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 your current Financial Institution.

7. Verify that your account list does not display a blue online circle icon for any accounts at your current financial institution*.*

Task 4:   Re-activate Your Account(s) at Seacoast Bank.

1. Log into the *Seacoast Bank* website at *www.seacoastbank.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 *Seacoast Bank*.

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

Thank you for making these important changes!