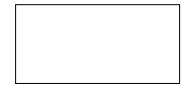
# Quicken for Mac Conversion Instructions



Quicken for Mac 2015-2016

**Express Web Connect** 

## Introduction

To complete these instructions, you will need your **[User ID and Password]** for the **WestSide Ban's** website.

NOTE:

Quicken Express Web Connect accounts use the same User ID and PIN/Password as WestSide Bank's 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

- 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.
- 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: Connect to WestSide Bank for a final download.

- 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) you use for online banking or investing.

## Task 3: Deactivate Your Account(s) at WestSide Bank.

- 1. Select your account under the **Accounts** list on the left side.
- 2. Choose **Accounts** menu > **Settings**.
- 3. Select Troubleshooting > Deactivate Downloads.
- 4. Repeat steps for each account at WestSide Bank.

## Task 4: Reactivate Your Account(s) at WestSide Bank

- 1. Select your account under the **Accounts** list on the left side.
- 2. Choose Accounts menu > Settings.
- 3. Select Set up transaction download.
- Enter Westside Bank in the Search field, select the name in the Results list and click Continue.
- 5. Enter your User Id and Password and click Continue.
- 6. If the bank requires extra information, enter it to continue.

**NOTE:** Select "Express Web Connect" or "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. Select Finish.

Thank you for making these important changes!