Quicken Essentials for Mac Conversion Instructions

Quicken Essentials and Quicken Mac 2016-2017

Web Connect

Table of Contents

Introduction

As ***STC Capital Bank*** completes its system conversion to ***St. Charles Bank & Trust Company®,*** you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your login credentials for the ***STC Capital Bank*** and ***St. Charles Bank & Trust Company*** 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. Tasks 1-3 must be completed on or before Friday, November 8th. Task 4 can be completed on or after Tuesday, November 12th.

Documentation and Procedures

Task 1: Conversion Preparation on or before Friday, November 8th.

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: Connect to STC Capital Bank on or before Friday, November 8th.

1. In Quicken, 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.

Task 3: Deactivate Your Account(s) At STC Capital Bank

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 ***STC Capital Bank.***

Task 4: Re-activate Your Account(s) at St. Charles Bank & Trust Company on Tuesday, November 12th.

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Enter ***St. Charles Bank & Trust Company*** in the Search field and click **Continue**.
4. Log in to ***St. Charles Bank & Trust Company*** at www.bankstcharles.com
5. **Download** a file of your transactions to your computer

IMPORTANT:	Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

6. Drag and drop the downloaded file into the box **Drop download file.**

NOTE:	Select "Web 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. Click **Continue.**

Thank you for making these important changes!