Quicken Essentials for Mac Conversion Instructions

Quicken Essentials and Quicken Mac

Express Web Connect

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Introduction

As ***Countryside Bank*** completes its system conversion to ***Wintrust Bank, N.A.®,*** you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your customer ID and PIN for the ***Countryside Bank*** and ***Wintrust Bank, N.A.*** 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, April 17th***. Task 4 can be completed on or after ***Monday, April 20th***.

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: Connect to Countryside Bank

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.

Task 3: Deactivate Your Account(s) At Countryside 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 ***Countryside Bank.***

Task 4: Re-activate Your Account(s) at Wintrust Bank, N.A.

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 ***Wintrust Bank, N.A.*** in the Search field and click **Continue**.
5. Enter your Login Credentials for ***Wintrust Bank, N.A.*** 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, and each additional account you wish to download into Quicken Essentials.

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

8. Click **Continue**.

Thank you for making these important changes!