Quicken Essentials for Mac Conversion Instructions

Quicken Essentials and Quicken Mac

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 login credentials 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 on or before Friday, April 17th.

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 on or before Friday, April 17th.

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 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. on Monday, April 20th.

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Enter ***Wintrust Bank, N.A.*** in the Search field and click **Continue**.
4. Log in to ***Wintrust Bank, N.A.*** at www.wintrustbank.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!