

# Quicken for Mac Conversion Instructions

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*Quicken for Mac 2015-2016*

*Express Web Connect*

## Introduction

As **Security State Bank WY** completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your **[User ID and Password]** for the **Security State Bank WY** websites.

**NOTE:** Quicken Express Web Connect accounts use the same User ID and PIN/Password as **Security State Bank WY** 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

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**Task 1:** Deactivate Your Account(s) at **Security State Bank WY** on or after **October 17, 2016**

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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 **Security State Bank WY**.

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**Task 2:** Reactivate Your Account(s) at **Security State Bank WY** on or after **October 17, 2016**

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1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download**.
4. Enter **Security State Bank WY** 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!*