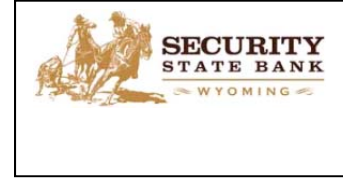


# Quicken for Mac Conversion Instructions

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*Quicken for Mac 2007*

*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.

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 Accounts at **Security State Bank WY** on or after **October 17, 2016**

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1. Choose **Lists** menu > **Accounts**.
2. Select the account to deactivate and click **Edit**.
3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
4. Remove the information within the **Account Number** and **Routing Number** fields.
5. Click **OK** to save your edits.
6. Repeat steps 2 – 5 for each account at **Security State Bank WY**.
7. Verify your account list does not display a blue online circle icon for the accounts you are deactivating.

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**Task 2:** Reactivate Your Accounts at **Security State Bank WY** on or after **October 17, 2016**

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1. Download your Quicken Web Connect file from <https://www.ssbwyo.bank>.

**IMPORTANT:** Take note of the date you last had a successful connection. If you have overlapping dates in the Web Connect import, you may end up with duplicate transactions.

2. Import your transactions to Quicken.
3. Associate the account to the appropriate account already listed in Quicken. Select **Use an existing account**.
4. Match the transactions you are importing to the corresponding existing Quicken account in the drop-down list and click **OK**.
5. Repeat steps for each account you are reactivating.
6. Choose **Lists** menu > Accounts. Verify each account at **Security State Bank WY** has a blue online circle indicating it has been reactivated for online services.

*Thank you for making these important changes!*