QUICKEN ® Essentials and QuickenMac 2015

As Rollstone Bank & Trust completes our Online Banking conversion, your Quicken settings must be modified to ensure the smooth transition of your data.

This update is time sensitive and can be completed on or after **6/15/2015**.

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.

Step One: 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.
- 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.

Step Two: Deactivate your account(s) at RBT within Quicken®

- Select your account under the **Accounts** list on the left side.
- Choose **Accounts** menu **Settings.**
- Remove the checkmark from **I want to download transactions.**
- Click **Save.**
- Click **Continue** when asked to confirm this deactivation.
- Repeat deactivation steps for each account at RBT.

Step Three: Reactivate your account(s) at RBT.

- Select your account under the Accounts list on the left side.
- Choose **Accounts** menu > **Update Selected Online Account.**
- Check the box **I want to download transactions** and click **Assist me.**
- Enter Rollstone Bank & Trust in the Search field and click **Continue**.
- Type your **User ID** and **Password** and click **Continue.**
- If the bank requires extra information, enter it to continue.

  NOTE: Select "Quicken Connect" for the "Connection Type" if prompted.

- 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.

- Repeat the last step for each additional account you wish to download into Quicken.
- Click **Continue.**