QUICKEN ® for MAC 2006 - 2007 Web Connect

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 the **Help** menu > **Search**. Search for **Backing Up,** select **"Backing Up Your Data,"** and follow the instructions.
- Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates,** select "**Checking for Updates to Quicken"** and follow the instructions.

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

- Choose **Lists menu** > **Accounts.**
- Select the account you want to disable and click **Edit.**
- In the **Download Transactions** drop-down list, select **Not Enabled.** Follow the prompts to confirm the deactivation.
- Remove the information within the **Account Number** and **Routing Number** fields.
- Click **OK** to save your edits.
- Repeat deactivation steps for each account at RBT.
- Verify that your account list does not display a blue online circle icon for any accounts at RBT.

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

- Log in to **Rollstone Bank & Trust** Online Banking web site
- Download and import your transactions to Quicken**.**
- Click the **Use an existing account** radio button.
- Select the corresponding existing Quicken account in the drop-down list and click **OK.**
- Repeat reactivation steps for all accounts at RBT.
- Choose **Lists** menu > Accounts. Verify that each account at RBT has a blue online circle indicating that it has been reactivated for online services.