



Quicken for Mac 2015-2017 Conversion Instructions

Express Web Connect

Introduction

From 6/9/17 – 6/12/17, Franklin Savings Bank will be completing system maintenance which affects the downloading of your online banking transactions into Quicken. It is necessary for you to modify your Quicken settings after those dates to ensure the smooth ongoing 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 Franklin Savings Bank's Online Banking.

NOTE: Quicken Express Web Connect uses the same User ID and Password as your financial institution's website.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

Documentation and Procedures

Task 1: Conversion Preparation (Open Quicken)

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: Disconnect Accounts at *Franklin Savings Banks* on or after **6/19/17**

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 to be disconnected.

Task 3: Reconnect Accounts to *Franklin Savings Bank* on or after **6/19/17**

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 *Franklin Savings Bank* 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**.