

# QUICKEN FOR MAC 2015-2017 CONVERSION GUIDE

A step-by-step tutorial for successfully modifying Quicken for a smooth transition.

## Introduction

As Horizon Bank completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your [User ID and Password] for the Horizon Bank website. **NOTE:** *Quicken Express Web Connect uses the same User ID and Password as your financial institution's website.*

It is important that you follow these instructions exactly as described and in the order presented or your online banking activity may stop functioning properly. This conversion should take about 15-30 minutes.

## Documentation & Procedures

### Task 1: Conversion Preparation

1. Back up 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 on screen.
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 Horizon Bank, SSB

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 at Horizon Bank, SSB

1. Select your account under the **Accounts** list on your left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set Up Transaction Download**.
4. Enter **Horizon Bank SSB** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Enter your **User ID** or **Password** and click **Continue**.

# QUICKEN FOR MAC 2015-2017 CONVERSION GUIDE (CONTINUED)

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**.