

QUICKEN Essentials for Mac 2010® Web Connect Conversion Instructions

As Canandaigua National Bank & Trust completes its system, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need to be able to log in to CNB's Web site.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online service may stop functioning properly. This conversion should take 10 minutes.

This update is time sensitive and must be completed between 10/24/11 and 11/7/11.

- **Note:** In the following screen shots, red icon numbers match step number instructions. All financial institution and register information is fictitious and for illustration only.
 - \triangle Within this guide, this symbol displays to indicate that there are optional FAQs.

Back Up Your Data

- **1**. Click on File at the top tool bar \rightarrow Back Up \rightarrow To Disk
- 2. Choose a file name and location, Click Save







Downloading The Latest Quicken[®] Update

1. Click on Quicken at the top tool bar and select Check for Updates

About Quicken	
Preferences	ж,
Check for Upda Register Quicke Provide Feedbac	tes. n ck
Services	•
Hide Quicken	жн
Hide Others	∖сжн
Show All	

2. If a software update is available, you will be prompted to download the update; select Install Update to proceed.

	Updating Quicken Essentials
Q	Ready to Install

Deactivate Your Accounts

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▼ ACCOUNTS
📰 Personal Checking 2
📄 Credit Card
📄 Credit Card 2

1. Select the account you want to deactivate, and click

Settings.

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2. In the **At your financial institution** section of the settings page, uncheck the "I want to download transactions" box. This will deactivate the online banking feature for this account. If you return to this screen you will see Canandaigua National Bank & Trust is no longer listed.

At your financial institution Reg I want to download transactions Assist Me Reg United States Image: State
Cancel Save

- 3. After you have made changes click Save to complete the deactivation process.
- 4. Repeat steps 1 through 3 for each online account (such as checking, savings and loans).

Reactivate Your Account for Web Connect

IMPORTANT: Complete the next on or after **11/8/11**.

- 1. Select your account and click Settings.
- 2. Check the "I want to download transactions" box.
- 3. Click the List button and select Canandaigua National Bank & Trust.
- 4. After selecting Canandaigua National Bank & Trust from the list, change the Connection Type to Web Connect and click Save.

	I want to download transactions	Assist Me		
Region:	United States			
Financial Institution:		List		
Connection Type:	Direct Connect			
Customer ID:				
Download start date:	Download all available transaction	15		
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- 5. Enter your Login ID and password to log into CNB's web site and download the latest transactions.
- 6. Repeat steps **1** through **5** for each online account (such as checking, savings and loans).

Thank you for making these important changes!