



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.

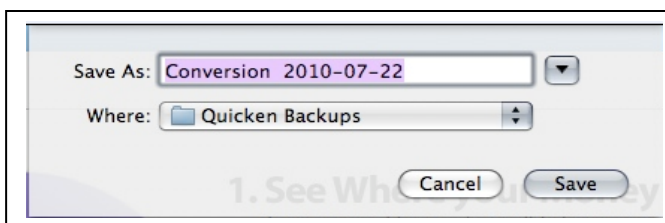
This update is time sensitive and must be completed between 10/24/11 and 11/7/11.

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.

 Within this guide, this symbol displays to indicate that there are optional FAQs.

Back Up Your Data

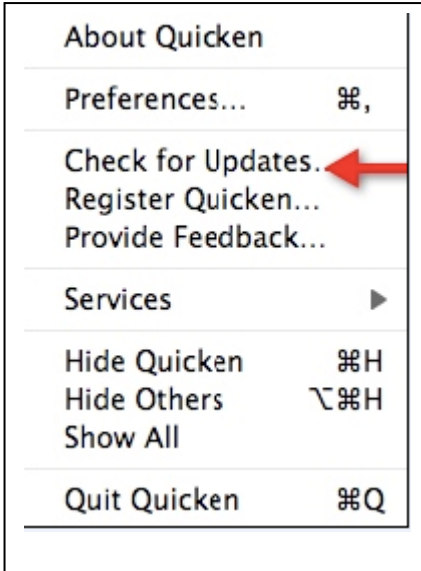
1. Click on File at the top tool bar → Back Up → To Disk
2. Choose a file name and location, Click Save



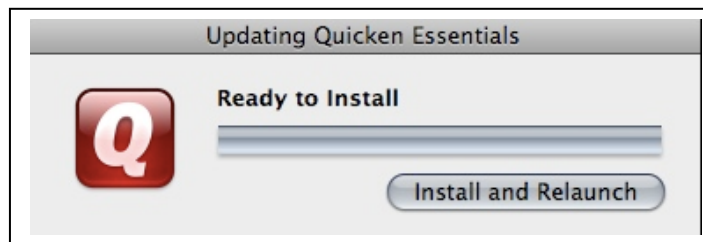


Downloading The Latest Quicken® Update

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

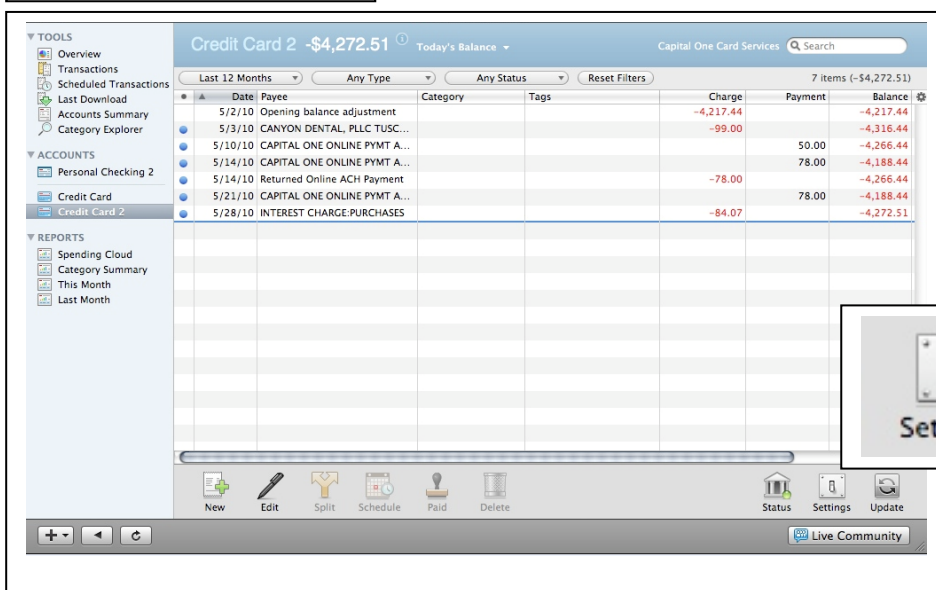
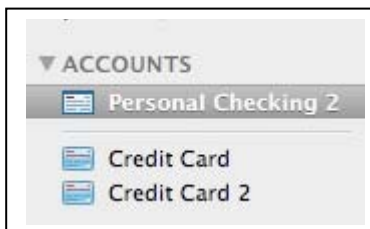


2. If a software update is available, you will be prompted to download the update; select Install Update to proceed.



Deactivate Your Accounts

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





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

I want to download transactions

Region:

Financial Institution: Capital One Card Services

Connection Type:

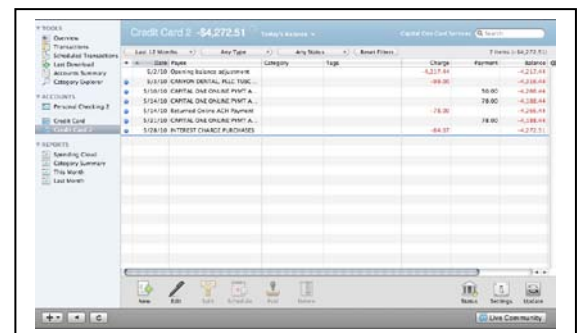
To update your account using Web Connect, sign on to your financial institution's website, download your transactions using your browser, and then import the transactions into Quicken Essentials.

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.



At your financial institution

I want to download transactions

Region:

Financial Institution: Canandaigua National Bank & Trust

Connection Type:

Customer ID:

Download start date: Download all available transactions
 Download transactions starting: 7/26/2010



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!