

Quicken Essentials for Mac 2010 Conversion Instructions

Express Web Connect



As **Vist Financial** 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 customer ID and PIN.

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.



This update is time sensitive and can be completed on or after **December 10, 2012**

Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu → **Search**. Search for “Backing Up” and 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” and select “Check for Updates...” and follow the instructions.

Connect to VIST Financial / VIST Bank - Business

1. Select your account under the “**Accounts**” list on the left side.
2. Choose **Accounts** menu → Select “**Update Selected Online Account**”.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Deactivate Your Account(s) At VIST Financial / VIST Bank Business

2. Choose **Accounts** menu → **Settings**.
3. Remove the checkmark from “I want to download transactions”.
4. Click **Save**.
5. Click **Continue** when asked to confirm this deactivation.

Note: Repeat steps 2 –5 for each account at VIST Financial / VIST Bank - Business.

Re-activate Your Account(s) At VIST Bank

1. Select your account under the “**Accounts**” list on the left side.
2. Choose **Accounts** menu →Select “**Update Selected Online Account**”.
3. Click “**List**” →Select [VIST Bank]
4. Click “**Continue**”.



Select “**Quicken Connect**” for the “**Connection Type**” if prompted.

5. Click “**Save**”.
6. Enter your “Login Credentials” for VIST Bank.
7. Click “**Continue**”.
8. In the “Choose your Accounts” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, you will want to select your existing account.



DO NOT select “**ADD**” under the action column.

9. Repeat step 8 for each additional account you wish to download into Quicken
10. Click “**Continue**”.

Thank you for making these important changes!