

# Quicken for Mac 2005 – 2007 Conversion Instructions Web Connect



As **Vist 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 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 and select “Backing Up Your Data” and follow the instructions.
2. Download the latest Quicken update. For instructions to download an update, choose **Help** menu → **Search**. Search for and select “Checking for updates to Quicken” and follow the instructions.

## Connect to VIST Financial / VIST Bank - Business

1. Choose **Online** menu → **Download Transactions...**
2. Select your account from the drop-down list.
3. Click **Download** to access VIST Financial / VIST Bank - Business website at [www.vistfc.com](http://www.vistfc.com)
4. Enter your customer ID and PIN to login to the VIST Financial / VIST Bank – Business web site. Download your transactions through October 19, 2012 into Quicken.

5. Repeat the download process for each account you have at VIST Financial / VIST Bank - Business (such as checking, savings, credit cards and brokerage).
6. Once all accounts have been downloaded, accept all transactions into your Quicken account registers.

## Deactivate Your Account(s)

1. Choose **Lists** menu → **Accounts**.
2. Select the account that you want to disable and click **Edit**.
3. In the Download Transactions drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
4. Delete the information within the Account Number and Routing Number fields.
5. Click **OK** to save your edits.
6. Repeat steps 2 – 6 for each account at VIST Financial / VIST Bank – Business.

Verify that your account list does not display a blue online circle icon for any accounts at VIST Financial / VIST Bank - Business

## Re-Activate Your Account(s) at VIST Bank

1. Log into the VIST Bank website at [www.vistbank.com](http://www.vistbank.com)
2. Download your transactions to Quicken.
3. Click the **Use an existing account** radio button.
4. Select the corresponding existing Quicken account in the drop-down list and click **OK**.
5. Repeat steps 2 – 4 for all accounts at [Financial Institution B].
6. Choose **Lists** menu → **Accounts**. Verify that each account at VIST Bank has a blue online circle indicating that it has been reactivated for online services.

**Thank you for making these important changes!**