

# Quicken for Mac 2015-2017

Conversion Instructions for Direct Connect to Express Web Connect



As **Commonwealth Bank and Trust Company** completes its internet banking enhancements, 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 Commonwealth Bank and Trust Company website.

**NOTE:** Quicken Web Connect/Express Web Connect accounts use the same User ID and PIN/Password as the Commonwealth Bank and Trust Company website.

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 between 15–30 minutes.

## TASK 1: CONVERSION PREPARATION

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

## TASK 2: DEACTIVATE YOUR ACCOUNT(S) AT COMMONWEALTH BANK AND TRUST

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 at Commonwealth Bank and Trust Company.

## TASK 3: RE-ACTIVATE YOUR ACCOUNT(S) AT COMMONWEALTH BANK AND TRUST

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download**.
4. Enter **Commonwealth Bank and Trust Company** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Enter your **User ID** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

**NOTE:** Select Web 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 unless you intend to add a new account to Quicken.

8. Select **Finish**.

*Thank you for making these important changes!  
If you need assistance, please contact Electronic Banking at 502.259.2375.*