Quicken for Mac Conversion Instructions

Quicken for Mac 2007

Web Connect to Direct Connect

Introduction

As Pinnacle Bank Nebraska completes its system upgrade*,* you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your ***[User ID and Password]*** for the Pinnacle Bank Nebraska website.

NOTE:	Direct Connect may require registration. Please contact Pinnacle Bank Nebraska to verify your Direct Connect login information.

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.

Documentation and Procedures

Task 1: Conversion Preparation

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

Task 2: Connect to Pinnacle Bank Nebraska for a final download by ***September 15, 2016***

1. Choose **Online** menu > **Download Transactions.**

2. Select your account from the drop-down list.

3. Click **Download** to access pinnbank.com.

4. Enter your **User ID** and **Password** to login to the website. Download your transactions through ***[Enter Date]*** into Quicken.

5. Repeat the download process for each account you have (such as checking, savings, credit cards and brokerage).

6. Once all accounts have been downloaded, accept all transactions into your Quicken account registers.

Task 3: Deactivate Your Account(s) At Pinnacle Bank Nebraska on or after ***September 15, 2016***

1. Choose **Lists** menu > **Accounts**.
2. Select the account to deactivate and click **Edit**.
3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
4. Remove the information within the **Account Number** and **Routing Number** fields.
5. Click **OK** to save your edits.
6. Repeat steps 2 – 5 for each account at Pinnacle Bank Nebraska.
7. Verify your account list does not display a blue online circle icon for the accounts you are deactivating.

Task 4: Re-activate Your Account(s) at Pinnacle Bank Nebraska on or after ***September 15, 2016***

1. Choose **Lists** menu > **Accounts**.
2. Select your first disabled account and click **Edit**.
3. Click the **Financial Institution** drop-down list and select **Change Financial Institution**.
4. Click on **Update List**.
5. In the **Financial Institutions** dialog, select Pinnacle Bank Nebraska Business from the list and click **Use**.
6. Enter your Direct Connect **User ID** and **Password**. Click **OK**.
7. In the **Add Online Services** dialog, match your first account to the appropriate account number. Click **OK**.

NOTE: Each account will be displayed below "**Use an existing account**."

8. Click **OK**.
9. Click OK to close the **Edit Register** page.
10. Choose **Lists** menu > **Accounts**. Verify that each account you are reactivating has a blue online circle for online services.

Thank you for making these important changes!