

Quicken® for Mac Personal Finance Software 2005–2007 Account Conversion Instructions for Web Connect



As of Monday, November 14, 2011, Marquette Bank has completed its Online Banking system conversion. The following instructions were designed to help you update your Quicken application in conjunction with your Marquette Bank Online Banking data.

Important – before proceeding with the instructions below you will first need to log in to your Marquette Bank Online Banking system and reset your password. For assistance in logging in please visit the following site: www.emarquettebank.com/obinfo and view Marquette Bank’s “Online Banking Log In Guide.”

Once you have you have setup your new Online Banking password, please be sure to make note of your USERNAME and PASSWORD which you need in order to modify your Quicken settings (below) to ensure the smooth transition of your data.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online banking service may stop functioning properly. This process should take approximately 10 minutes.

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.

In this document, Quicken 2006 screen shots display. While the screens may look slightly different depending upon version, the functionality remains the same. Any instructional differences are clearly noted.

You may update your Quicken application as Monday, November 14, 2011 or anytime thereafter

A.

BACK UP YOUR CURRENT DATA

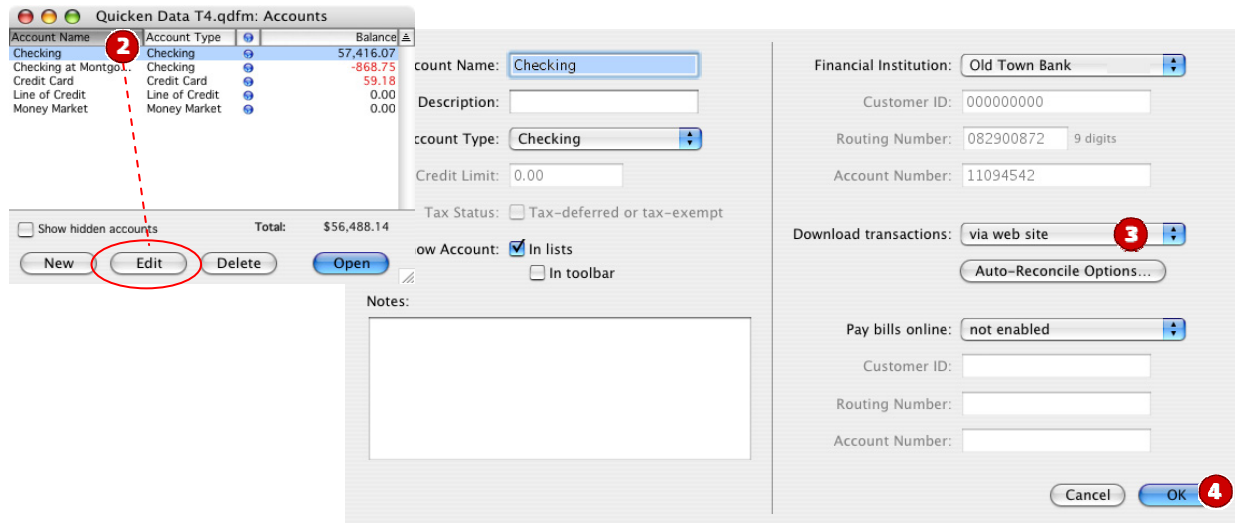
1. *Quicken for Mac 2006 & 2007 customers:* Choose **File** menu → **Back Up** → **To Disk...**
Quicken for Mac 2005 customers: Choose **File** menu → **Save a Copy...**
2. Complete the following prompts.

B.

DOWNLOAD THE LATEST QUICKEN UPDATE

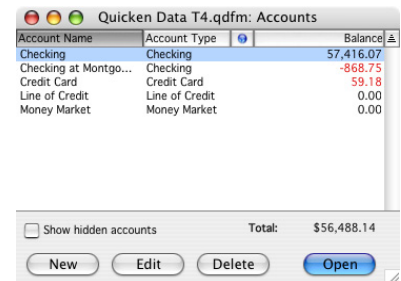
1. *Quicken for Mac 2006 & 2007 customers:* Choose **Quicken 2006 or 2007** menu → **Check for Updates**.
Quicken for Mac 2005 customers: Choose **Quicken 2005** menu → **Check for Updates**.
2. If a software update is available, then you will be prompted to download the update from the Quicken Web site.
3. Once the update is complete, restart Quicken.

1. Choose **Lists** menu → **Accounts**.



2. Select the account you want to disable, and click **Edit**. Update **Account Number and Routing Number** as needed.
3. In the **Download transactions:** drop-down list, select **not enabled**. Click **OK** to the prompt, “You are about to disable...” (not shown)
4. Click **OK** to save your edits.

Repeat steps **2** through **4** for each online account (such as checking, savings, credit cards, and brokerage). As each online account is disabled, its blue online circle icon disappears. Verify that your account list does not display blue online circle icons for any accounts.



D.

ENABLE YOUR ACCOUNTS FOR WEB CONNECT

IMPORTANT: Complete section **E** *after* the conversion date.



1. Log in to your Marquette Bank Online Banking system and download your transactions into Quicken.

Important: To avoid the possibility of creating duplicate records when downloading into Quicken, select a “from” date that does not include records previously downloaded from Marquette Bank.

2. Click the **Use an existing Quicken account** radio button. In the corresponding drop-down list, select the Quicken account.

Select Account to Enable

You are downloading transactions for the following account:

Financial Institution: 1st National Bank & Trust
Account Type: Checking
Account Number: 11094542

Quicken does not have an associated account to handle these transactions. Select an existing account or enter a new account name, and click OK.

2 Use an existing account:

Create a new account:

Cancel OK

Select your existing account here.

Repeat steps **1** and **2** for each account that you will use for online banking from Marquette Bank.

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!