

# Quicken for Mac Conversion Instructions

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*Quicken for Mac 2006-2007*

*Web Connect*

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## Introduction

As Bank of Clarke County completes its system conversion our new online banking platform, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your Access ID and password for the Bank of Clarke County websites.

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.

**NOTE:** This update is time sensitive and can be completed on or after August 11, 2014.

## Documentation and Procedures

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### Task 1: Conversion Preparation

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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 "**Checking for Updates to Quicken**," and follow the instructions.

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### Task 2: Connect to Bank of Clarke County's EagleOnline

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1. Choose **Online** menu > **Download Transactions**.
2. Select your account from the drop-down list.
3. Click **Download** to access Bank of Clarke County's website at [www.bankofclarke.com](http://www.bankofclarke.com)
4. Enter your Access ID and password to login to the Bank of Clarke County web site. Download your transactions through *August 11, 2014* into Quicken.
5. Repeat the download process for each account you have at Bank of Clarke County (such as checking, savings, credit cards and brokerage).

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

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**Task 3: Deactivate Your Account(s) At Bank of Clarke County**

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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. 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 Bank of Clarke County.
7. Verify that your account list does not display a blue online circle icon for any accounts at Bank of Clarke County.

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**Task 4: Re-activate Your Account(s) at Bank of Clarke County**

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1. Log into the website at [www.bankofclarke.com](http://www.bankofclarke.com)
2. Download and import 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 3-4 for all accounts at Bank of Clarke County
6. Choose **Lists** menu > **Accounts**. Verify that each account at Bank of Clarke County has a blue online circle indicating that it has been reactivated for online services.

*Thank you for making these important changes!*