Quicken Essentials for Mac

Web Connect Conversion Instructions

As ***Heritage Bank of Commerce*** 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 login credentials for the ***Heritage Bank of Commerce*** online banking.

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 ***April 7, 2014***

Conversion Preparation

- Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for ***Backing Up Your Data*** and follow the instructions.
- Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for ***Checking for Updates to Quicken*** and follow the instructions.

1. **Deactivate Your Account(s) At Heritage Bank of Commerce.**
2. Choose **Accounts** menu > **Settings**.
3. Remove the checkmark from "**I want to download transactions**".
4. Click **Save**.
5. Click **Continue** when asked to confirm this deactivation.
6. Repeat steps 2 – 5 for each account at ***Heritage Bank of Commerce***

(The name of the buttons referenced above may vary depending on the services and the version of Quicken you are using.)

Re-activate Your Account(s) at Heritage Bank of Commerce

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Click **List** menu > Select ***Heritage Bank of Commerce NEW.***
4. Click **Continue**.

Select "Quicken Connect" for the "Connection Type" if prompted.

5. Enter your Login Credentials for ***Heritage Bank of Commerce.***
6. Click Continue.
7. In the "Choose your Accounts" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select your existing account, and each additional account you wish to download into Quicken Essentials.

IMPORTANT: Do NOT select "ADD" under the action column.

8. Click **Continue**

Thank you for making these important changes!