Quicken for Mac Conversion Instructions

NATIONAL BANK

Quicken for Mac 2015/2016

Direct Connect

Introduction

Inwood National Bank is pleased to announce connectivity with Intuit products and **Inwood National Bank's** online banking. 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 username and password for the **Inwood National Bank** 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 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 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 Accounts at ***Inwood National Bank***

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 ***Inwood National Bank.***

Task 3: Reactivate Your Accounts at ***Inwood National Bank***

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 ***Inwood National Bank*** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
5. Enter your Direct Connect **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

> **NOTE:** Select "Direct Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, 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!