

# Quicken Essentials and Quicken Mac 2015 Conversion Instructions

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*Quicken Essentials and Quicken Mac 2015*

*Web Connect*

## Table of Contents

**TABLE OF CONTENTS** ..... 1

**INTRODUCTION**..... 2

**DOCUMENTATION AND PROCEDURES**..... 2

    Task 1: Conversion Preparation.....2

    Task 2: Deactivate Your Account(s) At Farmers and Merchants Bank .....2

    Task 3: Re-activate Your Account(s) at Farmers and Merchants Bank - GA .....2

## Introduction

As **Farmers and Merchants Bank** 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 **User ID and Password** for the **Farmers and Merchants 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.

**NOTE:** This update is time sensitive and can be completed on or after **01/06/2015**.

## 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 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.

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### Task 2: Deactivate Your Account(s) At Farmers and Merchants Bank

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1. Select your account under the **Accounts** list on the left side.
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 **Farmers and Merchants Bank**.

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### Task 3: Re-activate Your Account(s) at Farmers and Merchants Bank - GA

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1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Enter **Farmers and Merchants Bank - GA** in the Search field and click **Continue**.

4. Log in to **Farmers and Merchants Bank - GA** web site at **[www.fmb.net](http://www.fmb.net)**.
5. **Download** a file of your transactions to your computer.

**IMPORTANT:** Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

6. Drag and drop the downloaded file into the box **Drop download file**.

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

7. In the "Accounts Found" screen, ensure you 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.

8. Click **Continue**.

***Thank you for making these important changes!***