Quicken for Mac Conversion Instructions

Quicken for Mac 2006-2007

Web Connect

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Introduction

As *The Commerce Bank of Washington* completes its Online Banking service 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 Commerce Bank of Washington's* online banking 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 process should take 15–30 minutes.

NOTE:	This update is time sensitive and can be completed on or after *September 23, 2013*.

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 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.

Task 2: Connect to The Commerce Bank of Washington (Optional)

1. Choose **Online** menu > **Download Transactions.**

2. Select your account from the drop-down list.

3. Click **Download** to access *The Commerce Bank of Washington's* website at *www.tcbwa.com*.

4. Enter your **Customer ID** and **PIN** to login to the *The Commerce Bank of Washington* web site. Download your transactions through *9/23/2013* into Quicken.

5. Repeat the download process for each account you have at *The Commerce Bank of Washington* (such as checking, savings, credit cards and brokerage).

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

Task 3: Deactivate Your Account(s) At The Commerce Bank of Washington

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 *The Commerce Bank of Washington*

7. Verify that your account list does not display a blue online circle icon for any accounts at *The Commerce Bank of Washington*

Task 4: Re-activate Your Account(s) at *The Commerce Bank of Washington*

1. Log into the *The Commerce Bank of Washington's* website at *www.tcbwa.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 *The Commerce Bank of Washington.*

6. Choose **Lists** menu > Accounts. Verify that each account at *The Commerce Bank of Washington* has a blue online circle indicating that it has been reactivated for online services.

Or – For Express Web Connect (One Step Update)

Task 5: Re-activate Your Account(s) at The Commerce Bank of Washington

7. Log into the *The Commerce Bank of Washington's* website at *www.tcbwa.com*.

8. Download your transactions to Quicken.

9. Click the **Use an existing account** radio button.

10. Select the corresponding existing Quicken account in the drop-down list and click **OK**.

11. Repeat steps 3-4 for all accounts at *The Commerce Bank of Washington*.

12. Choose **Lists** menu > Accounts. Verify that each account at *The Commerce Bank of Washington* has a blue online circle indicating that it has been reactivated for online services.

Thank you for making these important changes!