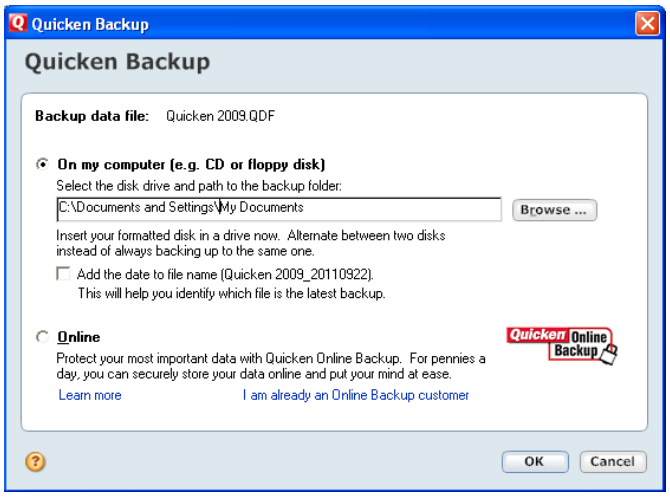
Online Banking Web Connect Conversion
Quicken Windows 2011

As your financial institution completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your customer ID/Password, PIN and security questions.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online banking service may stop functioning properly. This conversion should take 15–20 minutes.

Back Up Your Current Data

1. Choose File menu → Backup and Restore → Back up Quicken file.
2. Specify where to back up your Quicken file → click Back up Now.

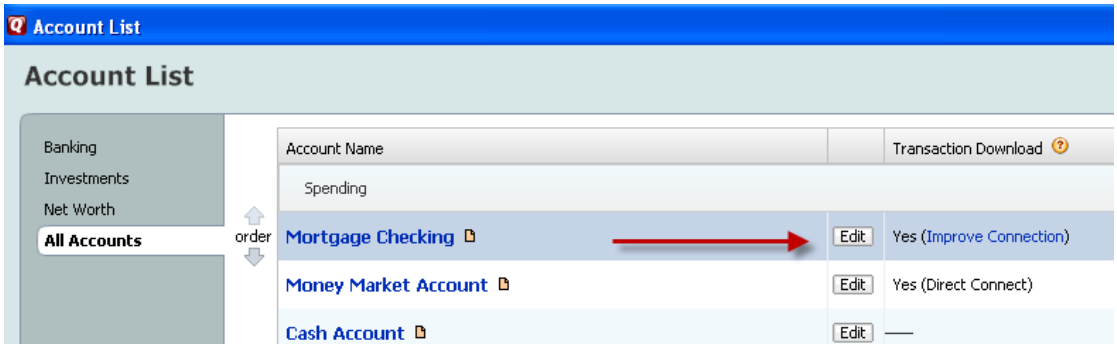


Download the Latest Quicken Update

1. Click on the Tools menu and select One Step Update (If the Password Vault prompt appears, click Cancel).
2. Uncheck all boxes → Update Now in the One Step Update Settings dialog.
3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.
4. When the update is completed, close and reopen Quicken.

Deactivate Web Connect

1. Click on the Tools menu → select Account List. Highlight the account you want to deactivate → click on the Edit button.



2. Click the Online Services tab → click the Remove Connection button.

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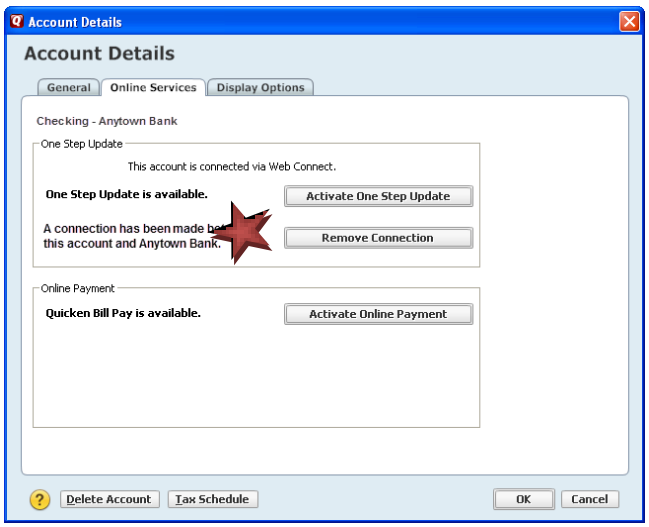
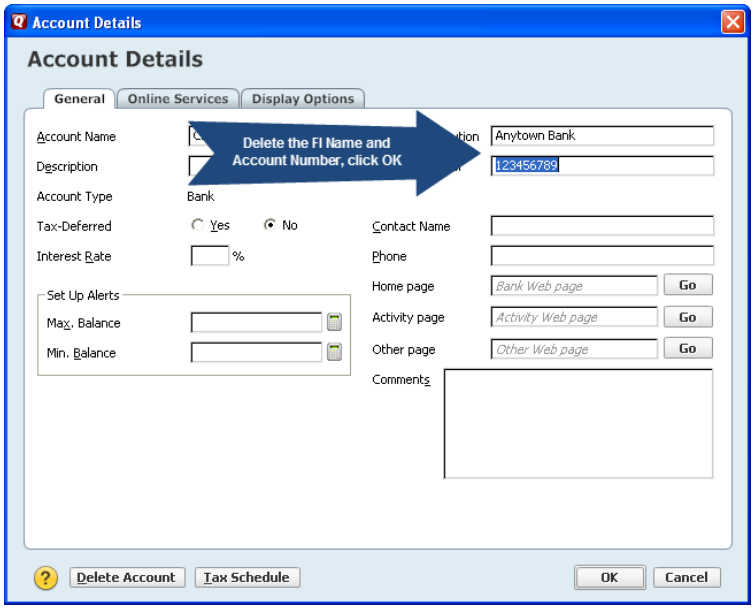


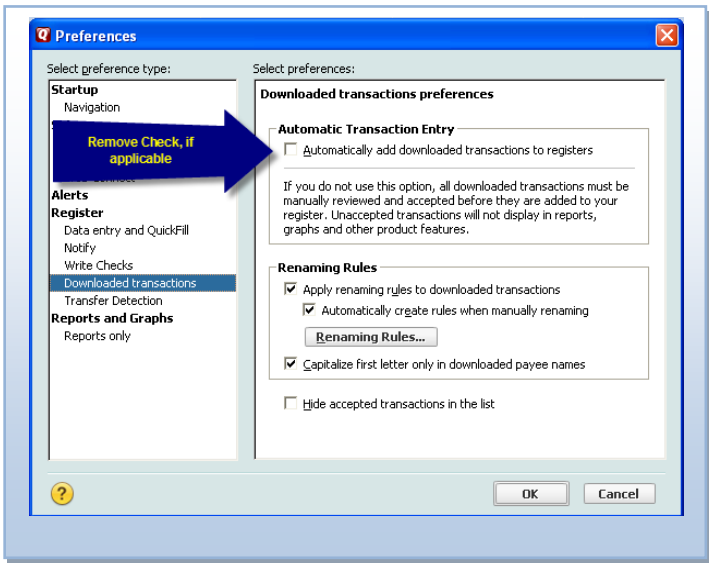
3. Quicken will prompt you to confirm deactivation → click Yes.

4. Select the General tab and remove the Financial Institution Name and Account Number as shown below → click OK to save changes.



Change Download Preferences

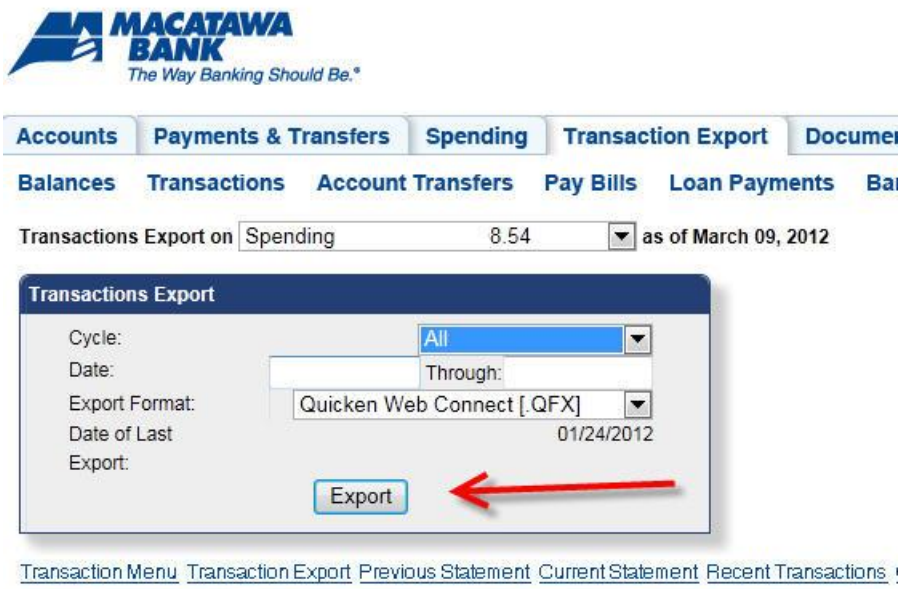
1. Click on the Edit menu → click on Preferences → Quicken Services
2. Select Downloaded Transactions in left column
3. Remove check from “Automatic Transaction Entry”, if applicable
4. Click OK



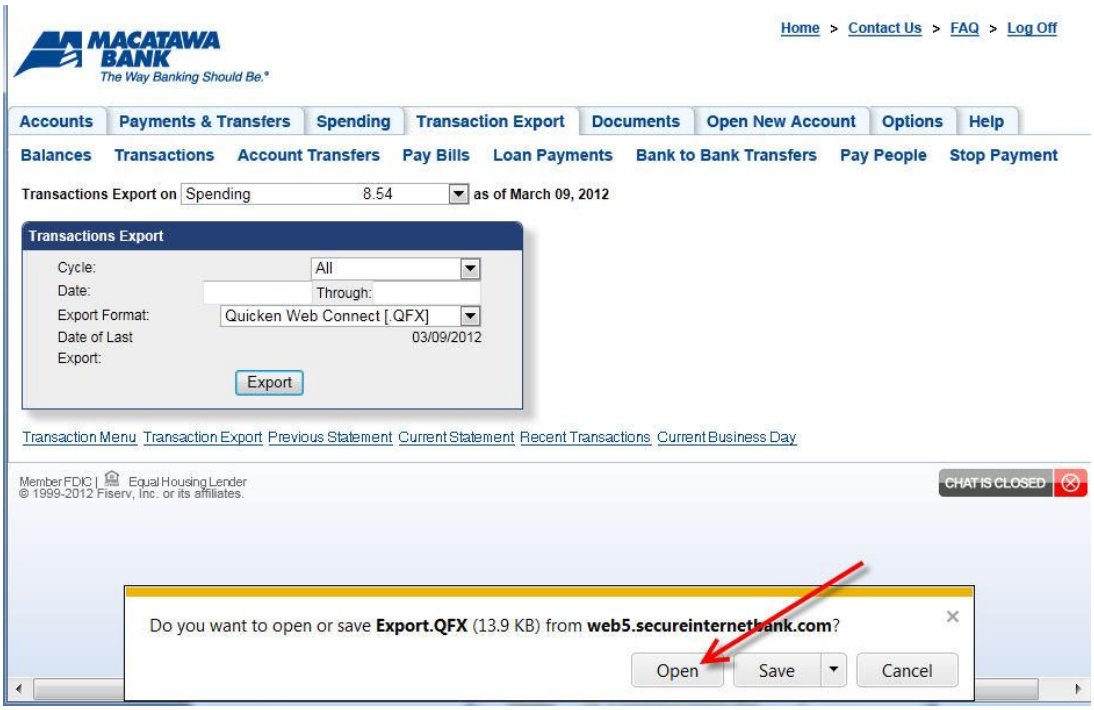
Activate Web Connect

1. Log into Macatawa Bank’s website from an external browser to initiate a download of a Web Connect file into Quicken (.QFX) as outlined in the following illustrations.

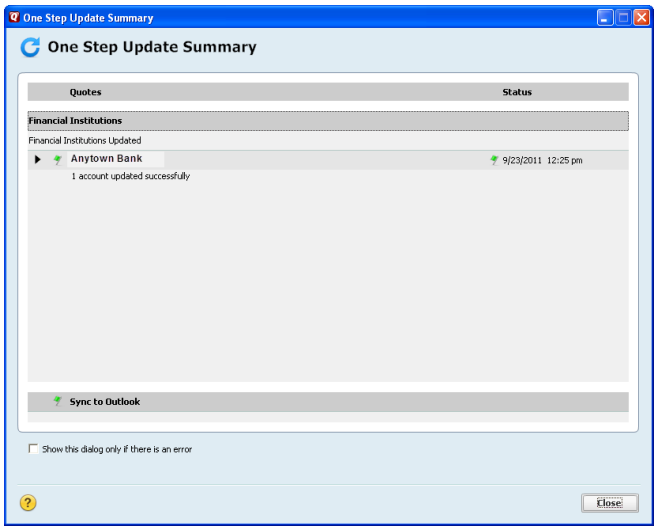
2. Select the transactions to export.



3. Open the QFX file that has been downloaded.

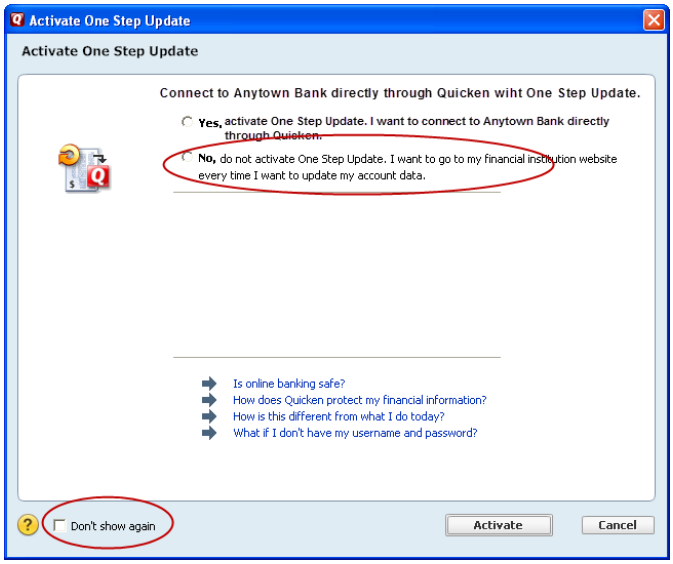


4. The One Step Update Summary screen will appear, confirming the account updated successfully.



5. Complete steps 1 thru 3 to reactivate each account for online banking.

NOTE: Now the account will be connected via Web Connect. Quicken may prompt to activate One Step Update after a successful Web Connect download. Please select No do not activate and check the box to not be prompted again.



Congratulations, you have completed the necessary changes!