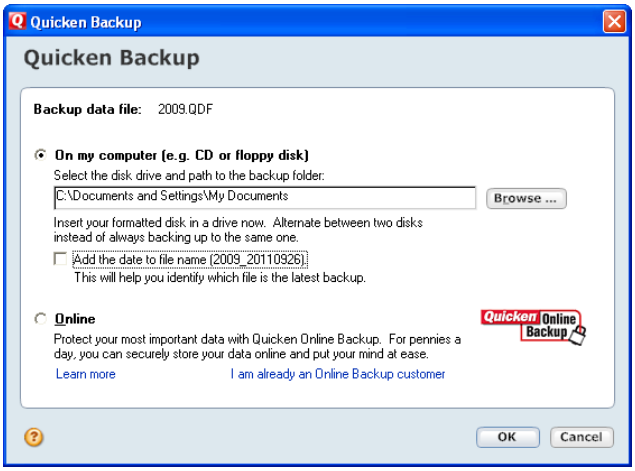
Online Banking Web Connect Conversion
Quicken Windows 2009

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, PIN/Password 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.
2. Specify which file to back up and where you want the backup saved in the Quicken Backup dialog, and then click OK.

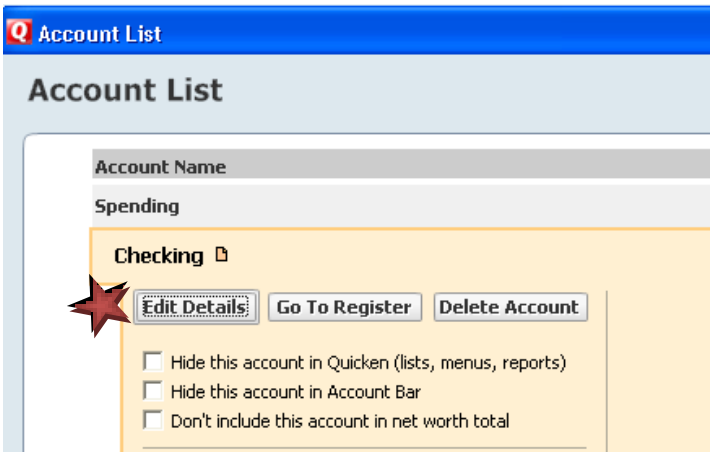


Download the Latest Quicken Update

1. Click on the Online menu → select One Step Update (Click Cancel if presented with Password Vault dialog box).
2. Uncheck all boxes → click Update Now in the One Step Update Settings dialog box.
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 Details button.



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

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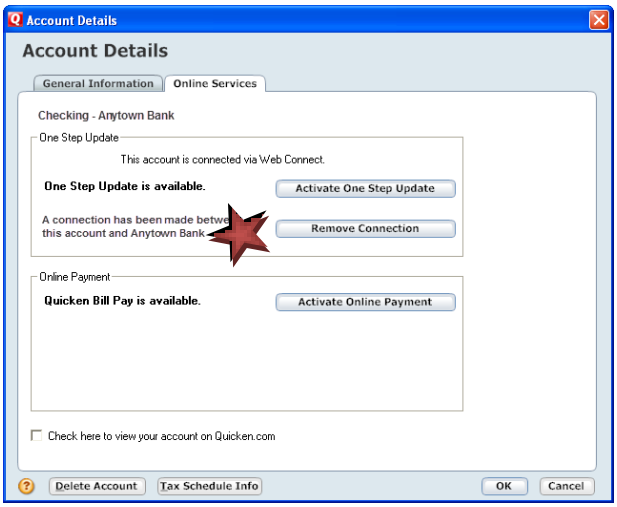
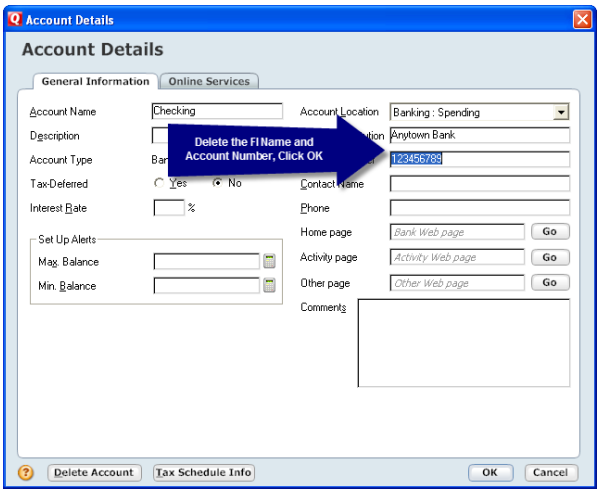


3. Quicken will prompt you to confirm deactivation → click Yes → click OK

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

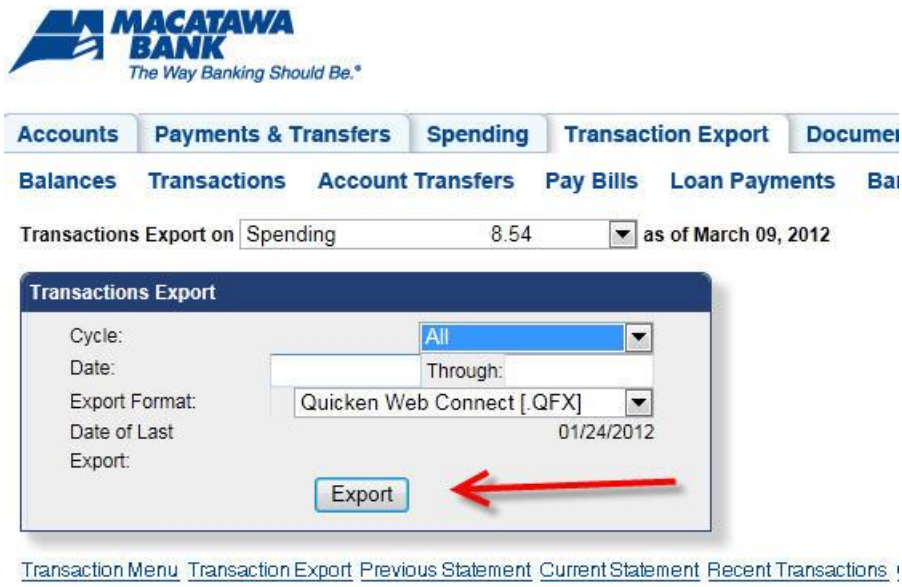


5. Repeat this step for each account you need to deactivate from online banking.

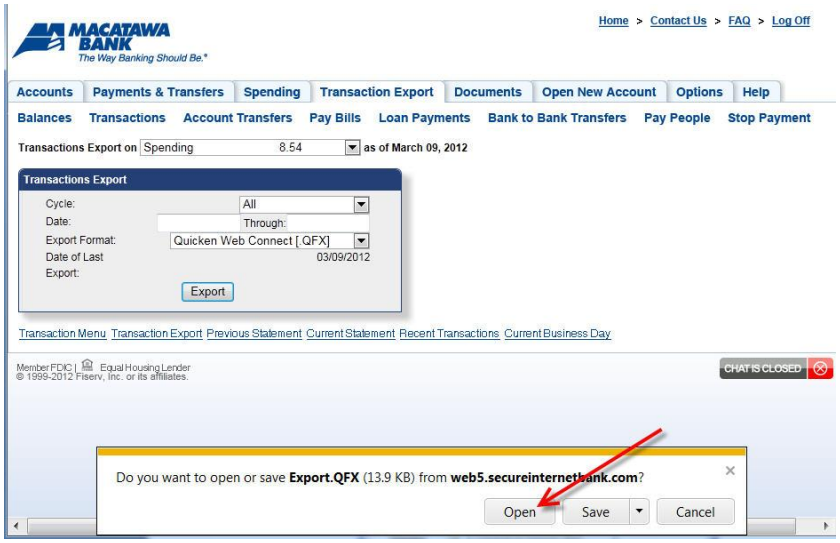
Activate Web Connect

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.

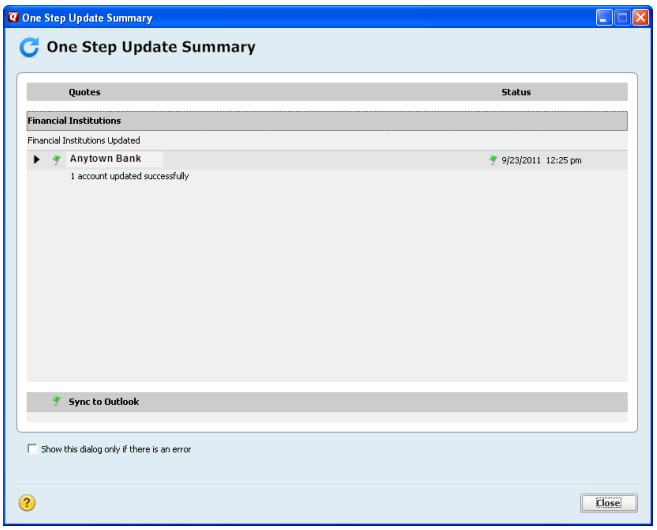
2. Select the transactions to export.



3. Open the QFX file that has been downloaded.

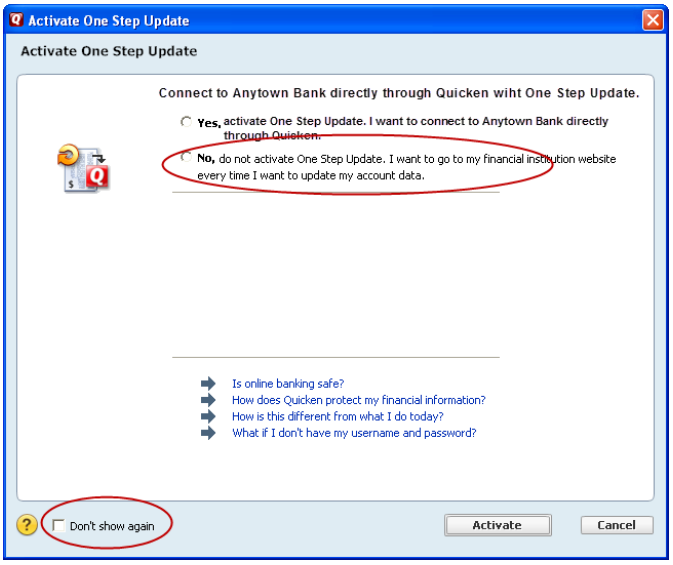


4. The One Step Update Summary screen will appear, confirming the account updated successfully.



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!