Quicken for Mac
Conversion Instructions

Express Web Connect

Introduction

As ***Peoples Community Bank*** completes its system conversion to ***C&F Bank,*** 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 User ID and Password for each Financial Institution.

NOTE:	**Quicken Express Web Connect** uses the same User ID and Password as your financial institution's website.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

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: Connect to ***Peoples Community Bank*** for a final download before ***6:00pm Eastern, Friday, April 24, 2020***

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) you use for online banking or investing.

Task 3: Disconnect Accounts at ***Peoples Community Bank*** on or after ***6:00pm Eastern, Friday, April 24, 2020***

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 to be disconnected.

Task 4: Reconnect Accounts to ***C&F Bank*** on or after ***9:00am Eastern, Monday, April 27, 2020***

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 ***C&F Financial Corp*** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Enter your **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

> **NOTE:** Select "Express Web Connect" or "Quicken 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. Select **Finish**.

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Thank you for making these important changes!

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: Connect to ***Peoples Community Bank*** for a final download before ***6:00pm Eastern, Friday, April 24, 2020***

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Sign in to online banking and download transactions for an account.
4. Import the transactions.
5. Repeat steps for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Connect Accounts at ***C&F Bank*** on or after ***9:00am Eastern, Monday, April 27, 2020***

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 ***C&F Financial Corp*** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Log in to ***C&F Bank.*** **Download** a file of your transactions to your computer.

NOTE:	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 unless you intend to add a new account to Quicken.

8. Click **Finish**.
9. Repeat steps for each account to be connected.