

Quicken Mac Web Connect

On October 16:

1. Backup your Quicken Mac data file and update the application.
 - a. Choose **File > Save a Backup**.
 - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Repeat this step for each account you need to update.
 - c. Accept all new transactions into the appropriate registers.

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Activate online banking connection for accounts connected to □

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Meredith Village Savings Bank in the search field, select the correct option and click **Continue**.
5. Log into your MVSBS online banking and download 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 titled **Drop download file**. Choose **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, click **Link** to pick your existing account.

Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.
8. Click **Finish**.

Quicken Windows Bill Pay

Only complete these tasks if you currently initiate Bill Payments from within Quicken Windows.

Important: These tasks must be completed to avoid possible duplicate payments. If you do not cancel payments scheduled to be paid on or after October 16, these payments may still be processed.

On or Before October 16

Cancel Existing Bill Payments.

1. Choose **Tools > Online Center**.
2. Choose Meredith Village Savings Bank from the Financial Institution drop-down list.
3. On the Payments tab, choose an account from which a payment is scheduled in the future.
4. In the payments status list, you will cancel payments for each payee with a status that is scheduled for delivery after October 16. To do this, select the first payee and click **Cancel Payment**.
5. Repeat steps 3 & 4 for all payments that are scheduled for delivery after October 16.
6. On the toolbar, click **Repeating**.
7. Choose a payment instruction and click **Delete**. Click **Delete** again in the confirmation window.
8. Repeat step 7 for each repeating payment you have with MVSBS.

On or Before October 20

Re-create Your Bill Payments.

If you need help re-creating payments, choose **Help > Quicken Help**. Search for **Create an online Payment** and follow the instructions to create and transmit an online payment.

Quicken Mac Bill Pay

Only complete these tasks if you currently initiate Direct Connect Bill Payments from within Quicken Mac.

Important: These tasks must be completed to avoid possible duplicate payments. If you do not cancel payments scheduled to be paid on or after the 1st Action Date, these payments may still be processed.

On or Before October 16

Cancel Existing Bill Payments.

1. Highlight a Bill Payment transaction on the account register.
2. While on the account register, choose **File > Print** to save your list of pending payments. You can use this when you re-create the bill payments and send these payments again.
3. Click **Edit** at the bottom of the account register window.
4. Click **Edit Details** below the highlighted transaction.
5. Click the Online Payment tab and choose **Cancel Payment**.
6. Repeat these steps for each outstanding Bill Payment you have scheduled with your financial institution.

On or Before October 20

Re-create Your Bill Payments.

For assistance with re-creating payments, choose **Help** and search for **Adding online Bill Pay transactions**. Follow the instructions to create and transmit an online payment.