

# TCB Online Banking

---

**Quicken Essentials for Mac 2010**

**TCB** **THE COOPERATIVE BANK**  
*Banking the Cooperative Way*

# Quicken Essentials for Mac 2010 Conversion Instructions for TCB Online Banking Users

---

## Introduction

A quick and Easy Guide to  
Quicken Essentials for Mac 2010  
Direct Connect to Web Connect

This guide is designed to help you answer your questions about Quicken Essentials for Mac 2010 as The Cooperative Bank completes its transition to the new TCB Online banking system. To begin, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your login credentials for TCB Online banking.

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 conversion should take 15–30 minutes.

We appreciate your business and are committed to providing you with the best possible banking experience.



**NOTE:** The following tasks are time sensitive and need to be completed on or after **5/20/2014**.

## 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 The Cooperative Bank

---

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 that you use for online banking.

---

### Task 3: Deactivate Your Account(s) At The Cooperative Bank

---

1. Select your account under the "**Accounts**" list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Remove the checkmark from "**I want to download transactions**".
4. Click **Save**.
5. Repeat steps 2-4 for each account at *The Cooperative Bank*.

---

### Task 4: Re-activate Your Account(s)

---

6. Log in to *The Cooperative Bank* web site at <https://www.thecooperativebank.com>.
7. Download and import your transactions to Quicken.
8. Ensure you associate the account to the appropriate account already listed in Quicken. Under the **Action** column, you will want to select your existing account.

**IMPORTANT:** **DO NOT** select "**ADD**" under the action column.

9. Repeat steps 2-3 for each additional account.

*Thank you for making these important changes!*

