

Quicken® Essentials for Mac 2010

Web Connect Conversion Instructions

As Platte Valley Bank completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need to be able to log into www.plattevalleybank.com with your Access ID and Password.

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

These steps can be completed on October 10, or later.

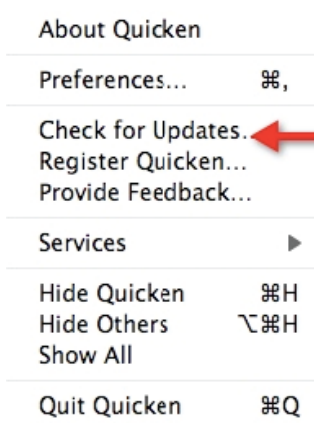
Back Up Your Current Data

1. Click on File at the top tool bar → Back Up → To Disk
2. Choose a file name and location → click Save

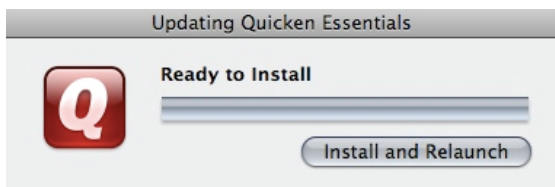


Download the Latest Quicken Update

1. Click on Quicken at the top tool bar → select Check for Updates.

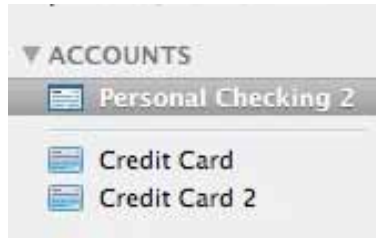


2. If a software update is available, you will be prompted to download the update.



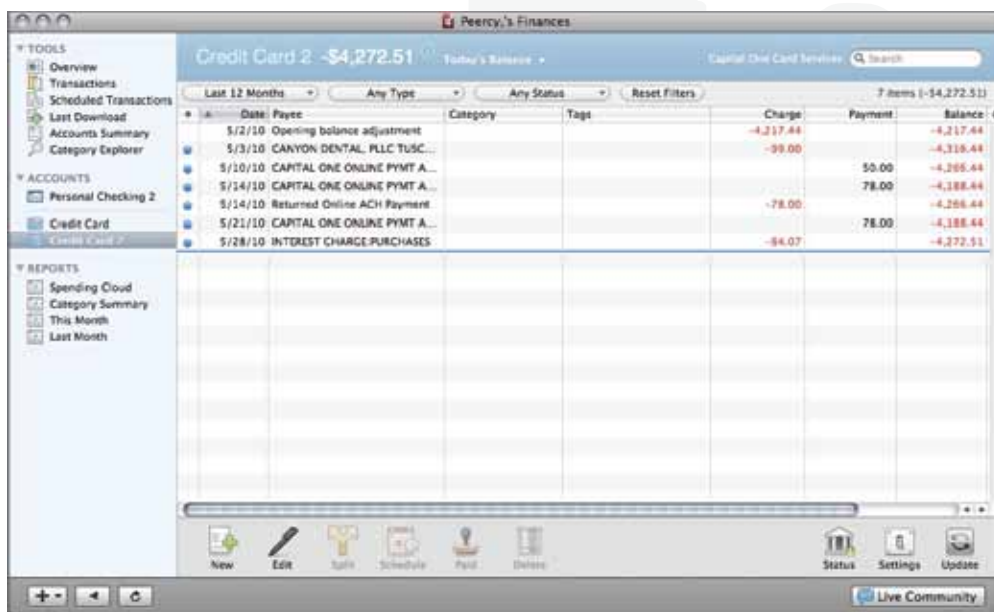
Get your Latest Transactions

1. Select account to be updated
2. Click Update
3. Log into www.plattevalleybank.com and download the latest transactions.



IMPORTANT

To avoid the possibility of creating duplicate records when downloading into Quicken, select a “from” date that does not include records previously downloaded.



Date	Payee	Category	Tag	Change	Payment	Balance
5/2/10	Opening balance adjustment			-4,217.44		-4,217.44
5/3/10	CANYON DENTAL PLLC TUSC...			-99.00		-4,316.44
5/10/10	CAPITAL ONE ONLINE PYMT A...				50.00	-4,266.44
5/14/10	CAPITAL ONE ONLINE PYMT A...				78.00	-4,188.44
5/14/10	Returned Online ACH Payment			-78.00		-4,266.44
5/21/10	CAPITAL ONE ONLINE PYMT A...				78.00	-4,188.44
5/28/10	INTEREST CHARGE PURCHASES			-84.07		-4,272.51

4. Repeat steps 2 and 3 for each account that you will use for online banking and investing.
5. Once the transactions are downloaded, accept all transaction into your Quicken account from the Downloaded Transaction tab.

IMPORTANT

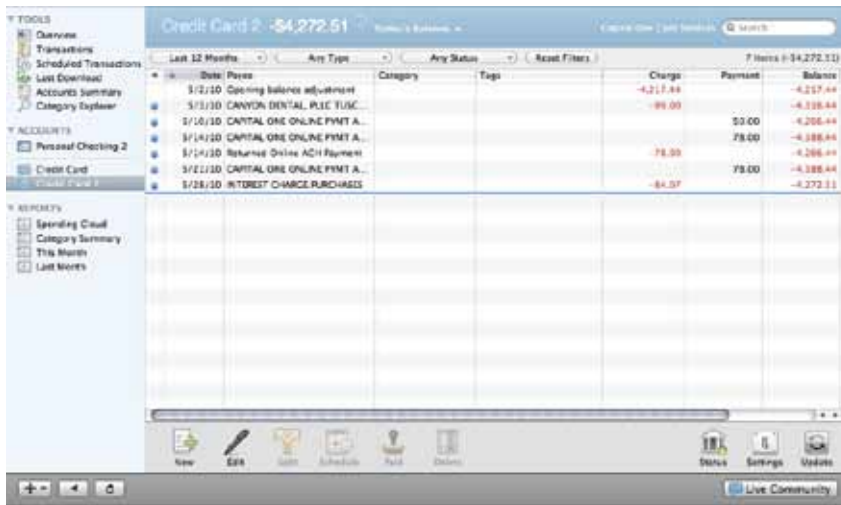
You will not be able to proceed to the next section until you accept all transactions in the Download Transactions tab

NOTE!

For help reconciling your account register, choose Help menu → Search for reconcile → select Reconcile Account

Deactivate your Account

1. Select the account you want to deactivate → click Settings.



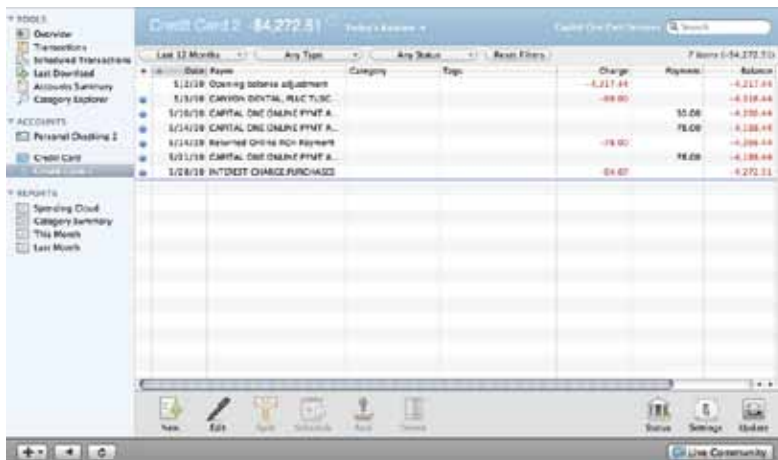
2. In the "At your financial institution" section of the settings page, uncheck the "I want to download transactions" box. This will deactivate the online banking feature for this account. If you return to this screen you will see that Platte Valley Bank is no longer listed.



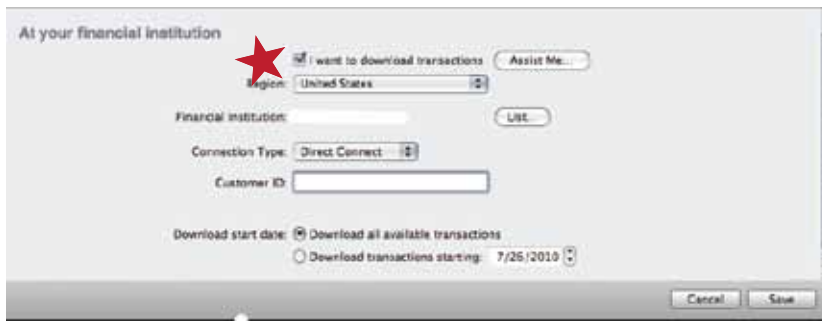
3. After you have made changes click Save to complete the deactivation process.
4. Repeat steps 1 through 3 for each online account.

Activate your Account for Web Connect

1. Select your account and click Settings.



2. Check the "I want to download transactions" box.
3. Click the List button and select Platte Valley Bank



4. After selecting Platte Valley Bank from the list, change the Connection Type to Web Connect and click Save.
5. Log into www.plattevalleybank.com and download the latest transactions.
6. Repeat steps 1 through 5 for each online account.



Congratulations, you have completed the necessary changes!



Platte Valley Bank[®]
www.plattevalleybank.com