



Quicken® for Mac® Personal Finance Software 2005–2007

## Account Conversion Instructions

Good news! Your upgrade to TreasuryPro is almost complete. All you need to do is modify the Quicken settings on each of your accounts to ensure the smooth transition of data. This update must be completed after you log in to the new online banking for the first time.

Please make sure you follow the instructions exactly as described and in the order presented. If you do not, Quicken may stop functioning properly. This conversion should take you about 10 minutes.

**Note:** In the following screen shots, red icon numbers match step number instructions. All bank and register information is fictitious and for illustration only.

In this document, Quicken 2007 screen shots display. While the screens may look slightly different depending upon version, the functionality remains the same. Any instructional differences are clearly noted.

## A. BACK UP YOUR CURRENT DATA

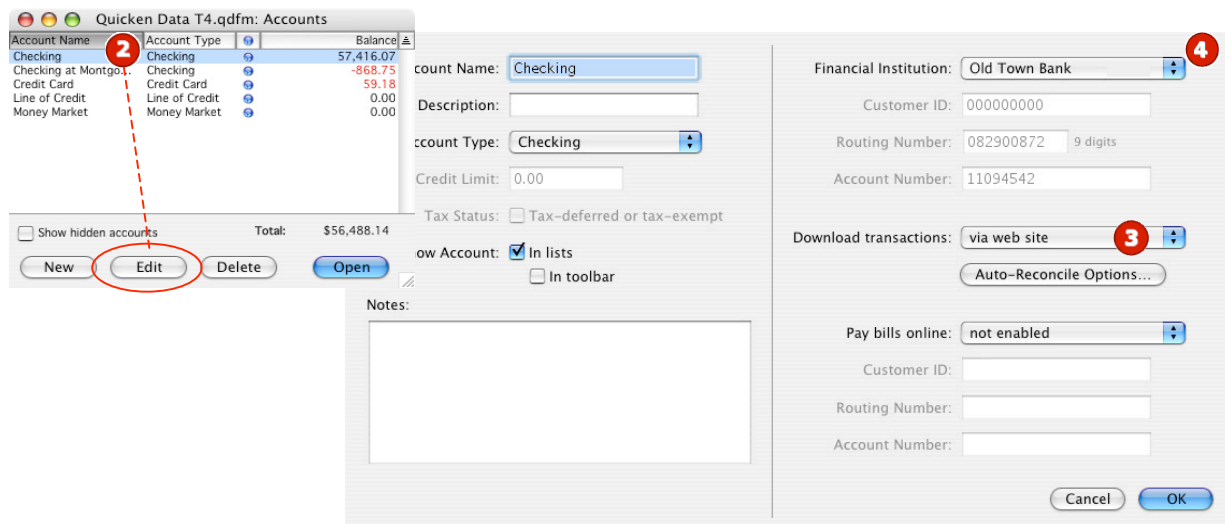
1. *Quicken for Mac 2006 and 2007 customers:* Choose **File** menu → **Back Up** → **To Disk....**  
*Quicken for Mac 2005 customers:* Choose **File** menu → **Save a Copy....**
2. Complete the following prompts.

## B. DOWNLOAD THE LATEST QUICKEN UPDATE

1. *Quicken for Mac 2007 customers:* Choose **Quicken 2007** menu → **Check for Updates.**  
*Quicken for Mac 2006 customers:* Choose **Quicken 2006** menu → **Check for Updates.**  
*Quicken for Mac 2005 customers:* Choose **Quicken 2005** menu → **Check for Updates.**
2. If a software update is available, then you will be prompted to download the update from the Quicken Web site.
3. Once the update is complete, restart Quicken.

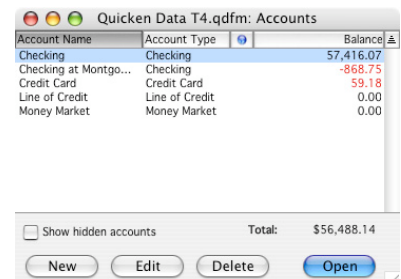
## C. DEACTIVATE YOUR ACCOUNTS TO REMOVE THE OLD QUICKEN LINK

1. Choose **Lists** menu → **Accounts.**



2. Select the account you want to disable, and click **Edit**.
3. In the Download transactions: drop-down list, select **not enabled**.  
Click **OK** to the prompt, "You are about to disable..."
4. Click **OK** to save your edits.

Repeat steps 2 through 4 for each Umpqua Bank online account. As each online account is disabled, its blue online circle icon disappears. Verify that your account list does not display blue online circle icons for any accounts at Umpqua Bank.



## D. ACTIVATE YOUR ACCOUNTS FOR TREASURYPRO

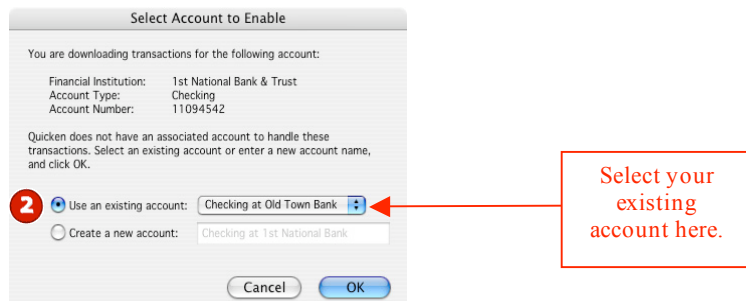
**IMPORTANT:** Complete section D *during or after* your first login to the new system.

1. Anytime during or after your first login, download your transactions into Quicken.



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

2. Click the **Use an existing Quicken account** radio button. In the corresponding drop-down list, select the Quicken account that you used before.



Repeat steps 1 and 2 for each account that you will use for online banking.

## THANK YOU FOR MAKING THESE IMPORTANT CHANGES!

If you have any questions regarding these instructions, you can contact us at:

California

1-866-563-1010 (toll-free)

7am-6pm (Pacific Time)

Oregon and Washington

1-877-511-3455 (toll-free)

6am-6pm (Pacific Time)

You may also refer to: <http://www.quicken.com/conversionfaqs> to access Quicken FAQs for Financial Institution Conversion Customers.

Look for information from Umpqua in Spring 2009 announcing our upgrade to Direct Connect!