Quicken Conversion Instructions

As your financial institution completes its system conversion, you will need to modify your Quicken settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for Mac.

On October 8, 2021:

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.

On or After October 12, 2021:

Activate online banking connection for accounts connected to financial institution that is requesting this change.

1. Select your account under the Accounts list on the left side.

2. Choose **Accounts > Settings**.

3. Select **Set up transaction download**.

4. Enter your financial institution name in the search field, select the correct option and click **Continue**.

5. Log into your financial institutions online banking site 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**.