Quicken Conversion Instructions

Quicken Mac Direct Connect & Quicken Connect

Instructions for One-Step Update initiated within Quicken

On or After Tuesday, December 8: Connect Your Accounts

1. Click your account in the Accounts list on the left side.

2. Choose **Accounts > Settings**.

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

4. Type the Bank's name in the search field, select the correct option and click **Continue.**

5. Enter your financial institution credentials. Quicken Connect uses the same credentials you as Online Banking. Direct Connect might not match your Online Banking credentials.

6. In the **Accounts Found** screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under **Action**, choose **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.

7. Click **Finish**.