

# Quicken Mac Conversion Instructions

Before the 1st Action Date: **May 8<sup>th</sup> 2025**

1. Backup Quicken Mac Data File & Update the Application.
  - a. Choose File > Save a Backup.
  - b. Download the latest Quicken Update. Choose Quicken > Check for Quicken 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. Accept all new transactions into the appropriate registers. (required)

On or After the 2nd Action Date: **May 13<sup>th</sup> 2025**

1. Deactivate online banking connection for accounts connected to financial institution that is requesting this change.
  - a) Choose Lists > Chart of Accounts.
  - b) Click the first account you would like to deactivate and choose Edit > Edit Account.
  - c) Choose Online Settings in the Edit Account window.
  - d) In the Online Account Information window, choose Not Enabled from the Download Transactions list and click Save.
  - f) Click OK for any alerts or messages that may appear with the deactivation.
  - g) Repeat steps for any additional accounts that apply.

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

- a) Select your account under the Accounts list on the left side.
- b) Choose Accounts > Settings.
- c) Select Set up transaction download.
- d) Enter your financial institution name in the search field, select the correct option and click Continue.
- e) 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.***

- f) Drag and drop the downloaded file into the box titled Drop download file. Choose Web Connect for the “Connection Type” if prompted
- g) 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.***

- h) Click Finish