



## Quicken® Mac Direct Connect and Quicken Connect

### On the 1st Action Date: June 19

1. Backup 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. Accept all new transactions into the appropriate registers.

### On the 2nd Action Date: June 22

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

1. Click your account in 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. Enter your financial institution credentials.
  - a. Express Web Connect uses the same credentials you use for your institution's online banking login.
  - b. Direct Connect might require credentials that do not match your online banking credentials.  
**Important: If your credentials do not work, contact your financial institution.**
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**.

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