



Quicken for Mac Conversion Instructions

Web Connect to Direct Connect

Introduction

As ***Machias Savings Bank*** completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your login credentials for online banking and/or Direct Connect.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. Go to **File > Save a Backup**
2. Download the latest Quicken Update. Go to **Quicken > Check for Updates**

Task 2: *Optional task* - Complete a final download **before your change date**

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Sign in to online banking and download transactions for an account.
4. Import the transactions.
5. Repeat steps for each account that you use for online banking or investing.

Task 3: Connect Accounts to *Machias Savings Bank –New* on or after **your change date**

1. Select your account in the **Accounts** list on the left sidebar.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download**.
4. Enter *Machias Savings Bank –New* in the **Search** field, select the institution name in the **Results** list and click **Continue**.
5. Enter your Direct Connect **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

NOTE: Select “Direct Connect” for the “Connection Type” if prompted.

7. In the “**Accounts Found**” screen, associate each new account to accounts in your Quicken data file. Under the **Action** column, select “**Link**” to pick your existing account. When complete, click Finish.

IMPORTANT: Do **NOT** select “**ADD**” under the action column unless you intend to add a new account to Quicken.