



Quicken Mac Direct Connect

On the 1st Action Date:

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:

1. Deactivate online banking connection for accounts connected to Bank3.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Financial Institution and Account Number information. Click **OK** to close window.
 - g. Repeat steps for any additional accounts that apply.

On the 3rd Action Date:

Activate the online banking connection for accounts connected to Bank3.

1. Click your account in the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Bank3 in the search field, select the correct option and click **Continue**.
5. Enter your financial institution 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**