



Quicken for Mac 2015-2017 Conversion Instructions

Web Connect to Direct Connect

Introduction

As **The Geo. D. Warthen Bank - DC** 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 User ID and Password for each Financial Institution.

NOTE: **Web Connect** uses the same User ID and Password as the **The Geo. D. Warthen Bank - DC** website. **Direct Connect** may require registration. Please contact **The Geo. D. Warthen Bank - DC** to verify your Direct Connect login information.

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. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up**, select **Backing up data files**, and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates**, select “Check for Updates,” and follow the instructions.

Task 2: Connect to *The Geo. D. Warthen Bank - DC* for a final download before **8/23/2017**

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 *The Geo. D. Warthen Bank - DC - DC* on or after **8/23/2017**

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 *The Geo. D. Warthen Bank - DC* 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.