Quicken for Mac Conversion Instructions

Web Connect to Direct Connect

Introduction

For the Central Valley Community Bank Personal Online Banking system upgrade, 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.

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: Complete a final download prior to **Tuesday, September 15th at 5:00 p.m.**

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 Central Valley Community Bank on or **September 16, 2020 after 9:00 p.m.**

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 **Central Valley Comm Bank** 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.