

Quicken for Mac

Conversion Instructions

Web Connect to Direct Connect

Introduction

As American State Bank of Grygla 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.

1. **Web Connect** uses the same User ID and Password as the ***American State Bank of Grygla*** website. **Direct Connect** may require registration. Please contact ***American State Bank of Grygla*** 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

1. Conversion Preparation
2. Backup your data file. Go to **File** > **Save a Backup**
3. Download the latest Quicken Update. Go to **Quicken** > **Check for Updates**
4. ***Optional task*** - Complete a final download **before** 3:30 Central on 10/4/2019
5. Select your account under the **Accounts** list on the left side.
6. Choose **Accounts** menu > **Update Selected Online Account**.
7. Sign in to online banking and download transactions for an account.
8. Import the transactions.
9. Repeat steps for each account that you use for online banking or investing.
10. Connect Accounts to ***American State Bank of Grygla*** on or after10/7/2019
11. Select your account in the **Accounts** list on the left sidebar.
12. Choose **Accounts** menu > **Settings**.
13. Select **Set up transaction download.**
14. Enter ***American State Bank of Grygla*** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
15. Enter your Direct Connect **User Id** and **Password** and click **Continue**.
16. If the bank requires extra information, enter it to continue.
17. Select “Direct Connect” for the “Connection Type” if prompted.
18. 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.
19. Do **NOT** select “**ADD**” under the action column unless you intend to add a new account to Quicken.