Columbia Bank

Quicken for Mac
Conversion Instructions

Direct Connect to Express Web Connect

Introduction

As *Atlantic Stewardship Bank* completes its system conversion to *Columbia Bank,* 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 Direct Connect and/or online banking.

NOTE:	**Direct Connect** may require registration. Please contact your financial institution to verify your Direct Connect login information. **Express Web Connect** uses the same User ID and Password as the *Columbia Bank* website.

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** *5pm Eastern on 3/13/2020*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Update Selected Online Account**.

3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Disconnect Accounts in Quicken on or after *3/16/2020*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Settings**.

3. Select **Troubleshooting** > **Deactivate Downloads.**

4. Repeat steps for each account to be disconnected*.*

Task 4: Reconnect Accounts to *Columbia Bank* on or after *3/16/2020*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Settings**.

3. Select **Set up transaction download.**

4. Enter *Columbia Bank* in the **Search** field, select the name in the **Results** list and click **Continue**.

5. Enter your **User Id** and **Password** and click **Continue**.

6. If the bank requires extra information, enter it to continue.

NOTE:	Select "Express Web Connect" or "Quicken Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select "**Link"** to pick your existing account.

> **IMPORTANT:** Do **NOT** select "**ADD**" under the action column.

8. Select **Finish**.