

Product: Quicken MAC Connect

As RSI 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 online banking.

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!

You should be linking to Columbia Bank NJ QK Personal.

By 10/14/2022 at 5pm:

1. Backup Quicken Mac Data File from your RSI Quicken connection 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.

After noon on 10/17/2022:

Activate the online banking connection for accounts connected to Columbia Bank.

1. Click your account in the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter your financial institution name in the search field, select the correct option and click **Continue**.
5. Enter your financial institution credentials.
 - a. Express Web Connect uses the same credentials you use for your institution's online banking login.
 - b. Direct Connect might require credentials that do not match your online banking 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**.