Quicken for Mac 2016-2018



Conversion Instructions

Express Web Connect to Direct Connect

Introduction

As Burling Bank 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. **Express Web Connect** uses the same User ID and Password as the Burling Bank website. **Direct Connect** for Burling Bank may require registration. Please contact your financial institutionto 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. 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.
3. 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.
4. Disconnect Accounts in Quicken on or after11/07/2018
5. Select your account under the **Accounts** list on the left side.
6. Choose **Accounts** menu > **Settings**.
7. Select **Troubleshooting** > **Deactivate Downloads.**
8. Repeat steps for each account to be disconnected.
9. Reconnect Accounts to ***Burling Bank*** on or after11/07/2018
10. Select your account under the **Accounts** list on the left side.
11. Choose **Accounts** menu > **Settings**.
12. Select **Set up transaction download.**
13. Enter Burling Bank RO DC or Burling Bank BO DC in the **Search** field, select the institution name in the **Results** list and click **Continue**.
14. Enter your Direct Connect **User Id** and **Password** and click **Continue**.
15. If the bank requires extra information, enter it to continue.
16. Select “Direct Connect” for the “Connection Type” if prompted.
17. In the “**Accounts Found**” screen, associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select “**Link”** to pick your existing account.
18. Do **NOT** select “**ADD**” under the action column unless you intend to add a new account to Quicken.
19. Select **Finish**.