Byron Bank

Quicken Mac Direct Connect and Quicken Connect Users

On the 1st Action Date: Friday, September 17, 2021

      1. Backup Quicken Mac Data File 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.

On the 2nd Action Date: Monday, September 20, 2021

Activate the online banking connection for accounts connected to the financial institution that is requesting this change.

      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.

           • Express Web Connect uses the same credentials you use for your institution's online banking login.

           • 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**.

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