Quicken for Mac Conversion Instructions

Origin Bank

Quicken for Mac 2015

Direct Connect

Introduction

As *Origin 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 *[User ID and Password]* for the *Origin Bank* website.

NOTE:	Direct Connect may require registration. Please contact *Origin Bank* to verify your Direct Connect login information.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

Documentation and Procedures

Task 1: Conversion Preparation

1. 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.

2. 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.

Task 2: Connect to *Origin Bank* for a final download before *2:00 pm on July 24, 2015*

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: Deactivate Your Account(s) At *Origin Bank* on or after *July 24, 2015*

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

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

3. Remove the checkmark from **I want to download transactions**.

4. Click **Save**.

5. Click **Continue** when asked to confirm this deactivation.

6. Repeat steps 2 – 5 for each account at *Origin Bank.*

Task 4: Re-activate Your Account(s) at *Origin Bank* on or after *July 27, 2015*

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

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

3. Check the box **I want to download transactions** and click **Assist me**.

4. Enter *Origin Bank* in the Search field and click **Continue**.

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

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

> **NOTE:**   Select "Direct 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. Repeat step 7 for each additional account you wish to download into Quicken.

9. Click **Continue**.

Thank you for making these important changes!