Quicken for Mac Conversion Instructions

Origin Bank

Quicken for Mac 2006/2007

Web Connect to 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 Your Data**, 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. Choose **Online** menu > **Download Transactions**
2. Select your account from the drop-down list.
3. Click **Download** to access ***Origin Bank*** website at ***[Financial Institution A URL]***.
4. Enter your customer ID and PIN to login to the ***Origin Bank*** web site.
5. Download your transactions through ***[Conversion Date]*** into Quicken.

6. Repeat the download process for each account you have at ***Origin Bank*** (such as checking, savings, credit cards and brokerage).

7. After all accounts have been downloaded, accept all transactions into your Quicken account registers.

Task 3: Deactivate Your Account(s) At ***Origin Bank*** on or after ***July 24, 2015***

1. Choose **Lists** menu → **Accounts**.

2. Select the account that you want to disable and click **Edit**.

3. In the Download Transactions drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.

4. Remove the information within the **Account Number** and **Routing Number** fields.

5. Click **OK** to save your edits.

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

7. Verify that your account list does not display a blue online circle icon for any accounts at ***Origin Bank.***

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

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

2. Choose **Lists** menu > **Accounts**.

3. Select your first disabled account and click **Edit**.

4. Click the **Financial Institution** drop-down list and select **Change Financial Institution**.

5. Click **Update List**.

6. In the **Financial Institutions** dialog, select ***Origin Bank*** from the list and click Use.

7. Enter the **Customer ID** and **PIN**. Click **OK**.

8. In the **Add Online Services** dialog, match your first account to the appropriate account number. Click **OK**.

NOTE: Each account will be displayed below “Use an existing account.”

9. Click **OK**.

10. Click **OK** to close the **Edit Register** page.

11. Choose **Lists** menu > **Accounts**. Verify that each account at ***Origin Bank*** has a blue online circle indicating that it has been reactivated for online services.

Thank you for making these important changes!