

Quicken for Mac 2015-2017 Upgrade Instructions

Direct Connect

Introduction

As **Fairfield County Bank** completes its system upgrade, 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.

NOTE: Direct Connect may require registration. Please contact Fairfield County Bank to 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

Task 1: Upgrade Preparation - Before 08.14.2018

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: Disconnect Accounts at *Fairfield County Bank-New* on or after 08.15.2018

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Troubleshooting** > **Deactivate Downloads**.
4. Repeat steps for each account to be disconnected.

Task 3: Reconnect Accounts to *Fairfield County Bank* on or after 08.15.2018

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download**.
4. Enter **Fairfield County Bank** in the **Search** field, select our name in the **Results** list and click **Continue**.
5. Enter your Direct Connect **User Id** and **Password** and click **Continue**.
6. If extra information is required, enter it to continue.

NOTE: Select "Direct Connect" for the "Connection Type" if prompted.

7. 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.

IMPORTANT: Do **NOT** select "**ADD**" under the action column unless you intend to add a new account to Quicken.

8. Select **Finish**.