



# Quicken® for Mac 2015-2017 Conversion

## Instructions

### *Express Web Connect or Web Connect to Direct Connect*

#### Introduction

Genesee Regional Bank has upgraded the integration between GRBOnline and Quicken. In addition to Web Connect or Express Web Connect, we now offer Direct Connect. Direct Connect supports a two way connection between GRBOnline and Quicken. It allows you to import transaction data from GRBOnline as well as make transfers between accounts and initiate bill payments, all within Quicken.

If you would like to upgrade your connection from Web Connect to Direct Connect, you will need to modify your Quicken settings to ensure the smooth transition of your data.

To complete these instructions, you will need your User ID and Password for GRBOnline.

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.

#### 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: Disconnect Accounts for Express Web Connect or Web Connect**

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 deactivated.

##### **Task 3: Reconnect Accounts to Direct Connect**

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 Genesee Regional Bank in the Search field, select the institution name in the Results list and click Continue.
5. Enter your GRBonline 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, 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.
9. You can verify if bill pay\* is setup for the account. Go to Settings in the bottom right of the Quicken screen. The Connection Settings screen appears.
10. Ensure that the connection type is Direct Connect and Bill Pay is turned on.
11. Bill payments can be sent by opening the account register for the account and selecting Online Payment.

*\*You must be enrolled in bill pay on GRBonline to use this feature.*

Additional Information:

*You must be using one of the three latest versions of Quicken to use Direct Connect.*

