

CollinsvilleBank

A Division of Northwest Community Bank

Quicken for Mac 2015-2017 Conversion Instructions

Web Connect to Direct Connect

Introduction

As we officially integrate our Northwest Community Bank and Collinsville Bank, a Division of Northwest Community Bank systems the weekend of March 19th – March 21st you will need to modify your QuickBooks with Direct Connect settings to ensure the smooth transition of your data. To complete these instructions, you will need your login credentials for your **Collinsville Bank, a Division of Northwest Community Bank** online banking profile.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

NOTE: **Web Connect** uses the same User ID and Password as the **Collinsville Bank, a Division of Northwest Community Bank** website. **Direct Connect** may require registration.

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: 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 **Collinsville Bank, a Division of Northwest Community Bank** for a final download before **March 19, 2021**

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Sign in to online banking and download transactions for an account.
4. Import the transactions.
5. Repeat steps for each account that you use for online banking or investing.

Task 3: Connect Accounts to **Northwest Community Bank** on or after **March 22, 2021**

1. Select your account in the **Accounts** list on the left sidebar.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download**.
4. Enter **Collinsville Bank, a Division of Northwest Community Bank** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
5. Enter your Direct Connect **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 accounts in your Quicken data file. Under the **Action** column, select “**Link**” to pick your existing account. When complete, click **Finish**.

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