

Quicken Conversion Instructions

As your financial institution completes its system conversion, you will need to modify your Quicken settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for both Windows and Mac, and all three connectivity types (Direct Connect, Express Web Connect or Web Connect).

These instructions refer to two “Action Dates.” The 1st Action Date (July 22, 2022) and 2nd Action Date (July 25, 2022) in the instructions will be provided to you by your financial institution.

IMPORTANT: Express Web Connect will not be available until 5 business days after the 2nd Action Date, so please utilize another connectivity type if you need transaction updates during this downtime. There is no delay for Web Connect or Direct Connect (if supported)

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Quicken Windows Direct Connect and Express Web Connect

On July 22, 2022:

1. Back up your Quicken Windows Data File. Go to **File > Copy or Back Up File > Create a Complete Backup**.
2. Download the latest Quicken Update. Go to **Help > Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

On July 25, 2022:

1. Deactivate online banking connection for accounts connected to Atlantic Capital Bank.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Financial Institution and Account Number information. Click **OK** to close window.
 - g. Repeat steps for any additional accounts that apply.
2. Reconnect the online banking connection for your accounts.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account you want to activate.
 - c. In Account Details, click **Online Services** and then choose **Set up Now**.
 - d. Type SouthState's name in the search field and click Next.
 - e. Enter your SouthState Online Banking credentials.
 - Express Web Connect uses the same credentials you use for your institution's online banking login.
 - Direct Connect might require credentials that do not match your online banking credentials.

Important: If your credentials do not work, contact your financial institution.

- f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu. **If your account number has recently changed, your new account number will display in the accounts drop-down menu.**

Important: Do NOT choose "Create a new account" unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, choose **Ignore – Don't Download into Quicken** or click **Cancel**.

- g. After all accounts have been matched, click **Next** and then **Done**.

Quicken Mac Direct Connect and Quicken Connect

On July 22, 2022:

1. Backup Quicken Mac Data File and Update the application.
 - a. Choose **File > Save a Backup**.
 - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Accept all new transactions into the appropriate registers.

On July 25, 2022:

Activate the online banking connection for accounts connected to SouthState.

1. Click your account in the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter SouthState's name in the search field, select the correct option and click **Continue**.
5. Enter your SouthState Online Banking credentials.
 - Express Web Connect uses the same credentials you use for your institution's online banking login.
 - Direct Connect might require credentials that do not match your online banking credentials.

Important: If your credentials do not work, contact your financial institution.
6. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under **Action**, choose **Link** to pick your existing account. **If your account number has recently changed, please be sure to pick your new account number. Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.**
7. Click **Finish**.

Quicken Windows Web Connect

On July 22, 2022:

1. Backup Quicken Windows Data File and Update.
 - a. Choose **File > Backup and Restore > Backup Quicken File**.
 - b. Download the latest Quicken Update. Choose **Help > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Repeat this step for each account you need to update.
 - c. Accept all new transactions into the appropriate registers.

On July 25, 2022:

1. Deactivate online banking connection for accounts connected to Atlantic Capital Bank.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Financial Institution and Account Number information.
 - g. Click **OK** to close window.
 - h. Repeat steps for any additional accounts.
2. Reconnect online banking connection for accounts that apply.
 - a. Download a Quicken Web Connect file from SouthState's online banking site.
 - b. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
 - c. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
 - d. Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken. **If your account number has recently changed, please be sure to look for your new account number.**
 - e. Repeat this step for each account you have connected to this institution.

Quicken Mac Web Connect

On July 22, 2022:

1. Backup your Quicken Mac data file and update the application.
 - a. Choose **File > Save a Backup**.
 - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Repeat this step for each account you need to update.
 - c. Accept all new transactions into the appropriate registers.

On July 25, 2022:

Activate online banking connection for accounts connected to SouthState.

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter SouthState's name in the search field, select the correct option and click **Continue**.
5. Log into your SouthState online banking and download your transactions to your computer.

Important: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.
6. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web 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, click **Link** to pick your existing account. **If your account number has recently changed, please be sure to pick your new account number.**

Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.
8. Click **Finish**.