Quicken for Mac
Conversion Instructions

Direct Connect

Introduction

As *SouthState* completes its transition to the new Online and Mobile Banking experience, 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 login credentials for Direct Connect.

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

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1. Backup your data file. Go to **File** > **Save a Backup**

2. Download the latest Quicken Update. Go to **Quicken** > **Check for Updates**

Task 2: Complete a final download **before** *December 11, 2020.*

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

2. Choose **Accounts** menu > **Update Selected Online Account**.

3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) you use for online banking or investing.

Task 3: Reconnect Accounts to *SouthState - New* on or after *December 11, 2020.*

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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 *SouthState – New 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 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**.