

## Quicken for Mac - Conversion Instructions

Quicken for Mac 2015

Web Connect

Washington  
Federal.  
invested here.

### Introduction

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As Washington Federal completes its system update, 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 online banking username and password.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

### Documentation and Procedures

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#### *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: Deactivate Your Account(s) at Washington Federal on or after 11/14/2015.*

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Remove the checkmark from **I want to download transactions**.
4. Click **Save**.
5. Click **Continue** when asked to confirm this deactivation.
6. Repeat steps 2 – 5 for each account at Washington Federal.

#### *Task 3: Re-activate Your Account(s) at Washington Federal on or after 11/17/2015.*

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Enter Washington Federal, N.A. in the Search field and click **Continue**. (If you are a Commercial Banking Online User, search for Washington Federal Business Banking.)
4. Log in to washingtonfederal.com
5. **Download** a file of 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 **Drop download file**.

**NOTE:** Select **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, select **Link** to pick your existing account.

**IMPORTANT:** Do NOT select “ADD” under the action column.

8. Click **Continue**.

*Thank you for making these important changes!*