

Direct Connect and Quicken Connect Transition Instructions for Quicken Mac

Please follow the instructions below to reconnect your accounts to Business Online Banking following the transition on March 20, 2023.

For Direct Connect, you will need new Direct Connect login credentials. These credentials will be sent to you via email within 10 days of the transition. If you have not received them by June 3, 2023, please contact the Transition Support Line at 833-961-3614.

Complete on March 17, 2023 by 5:00 p.m. PT:

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.

Complete on or After March 20, 2023:

Activate the online banking connection for accounts connected to Columbia Bank.

1. Click your account in the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter **Umpqua-Business Direct Connect** in the search field, select the correct option and click **Continue**.
5. Enter your credentials.
 - **Express Web Connect** uses the same credentials as your Business Online Banking credentials.
 - **Direct Connect** requires separate credentials which will be provided to you by email within 10 days of the transition on March 20, 2023.

Important: If your credentials do not work, contact the Transition Support Line at 833-961-3614.

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.

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

7. Click **Finish**.