



Transitioning to the Columbia Bank name

Instructions for Quicken Express Web Connect, Quicken Connect and QuickBooks Online-Automatic Update

1. **Backup your data.**
 - a. Quicken (Windows): Go to File > Backup and Restore > Backup Quicken File
 - b. Quicken (Mac): Go to File > Save a Backup
2. **Update your software.**
 - a. Go to Help or Quicken > Check for Updates
3. **(Quicken only) Complete a final download.** Before disconnecting, complete a final transaction download to ensure all transactions are included in your registers and categorized correctly.
4. **Deactivate or disconnect your accounts.**
 - a. Quicken: Go to Tools > Account List, select the account, click Edit, then Online Services, and click Deactivate. Follow the prompts to confirm.
 - b. QuickBooks: Go to Banking (or Transactions > Bank Transactions), select the account, click the tile or pencil icon, choose Edit account info, select Disconnect this account on save, and then Save and Close.
5. **Reconnect your accounts.**
 - a. Quicken: From the Account List, select the account, click Edit, then Online Services, and click Set up Now. Enter Columbia Bank or ColumbiaBank.com then your online banking login credentials. When prompted, carefully link to your existing Quicken account.
 - b. QuickBooks: Go to Banking (or Transactions > Bank Transactions) and choose the disconnected account or click Connect account. Search for Columbia Bank or ColumbiaBank.com and enter your online banking login credentials. Ensure you link to your existing account and use the date of the last downloaded transaction as the start date to prevent duplicates.