Quicken for Mac Instructions

Quicken for Mac 2015

Introduction

As ***UBS Financial Services Inc.*** completes its system upgrade to allow you to use your website User Name and Password, you will need to modify your Quicken login credentials to ensure the smooth connection to your data. To complete these instructions, you will need your ***UBS Online Services (OLS) website User Name and Password.***

Verify your login information by going to www.ubs.com/onlineservices and logging in. If you do not have a login, select ***Register Now***. If you do not remember your login credentials select ***Forgot User Name*** or ***Forgot 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. After you back-up your data file, this change should take 5-10 minutes.

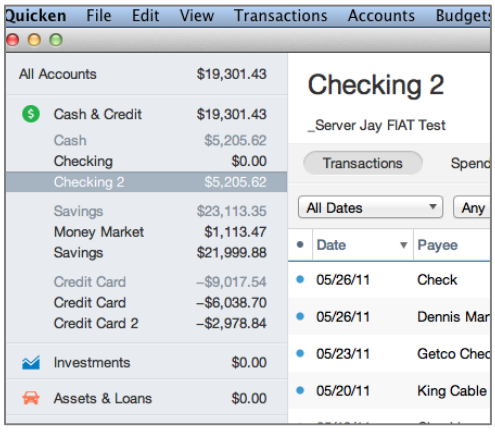
Documentation and Procedures

Task 1: Preparation

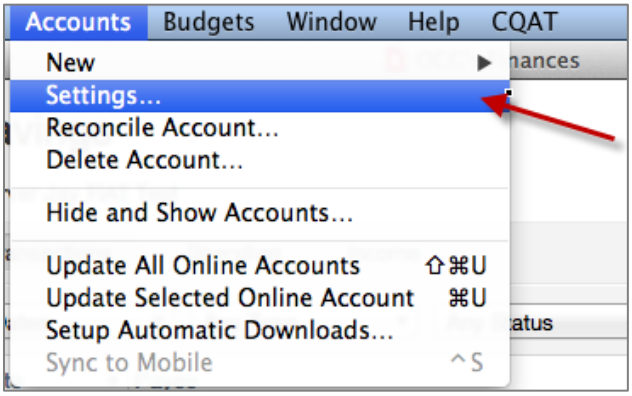
1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for ***Backing Up***, select **Backing up data files**, and follow the instructions.

Task 2: Disable Your Online Connection for Account(s) At ***UBS Financial Services Inc.***

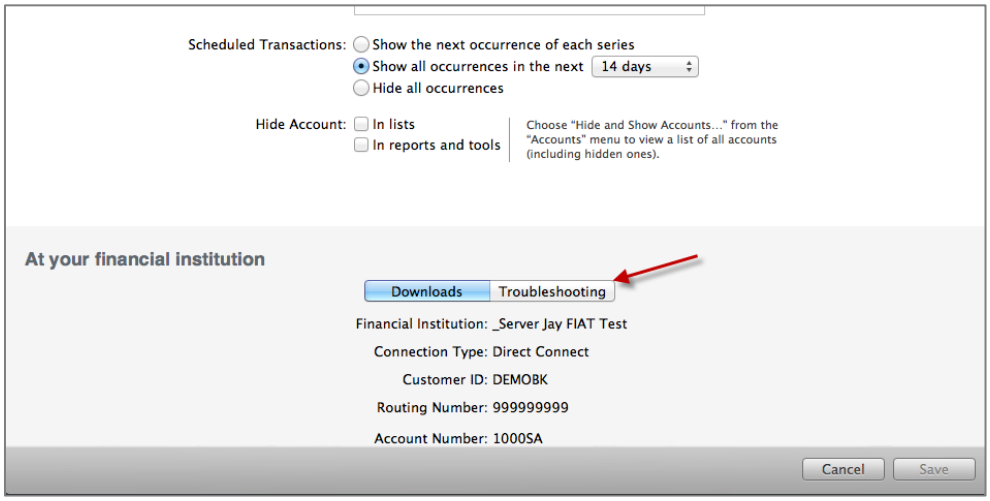
1. Select your account under the **Accounts** list on the left side.



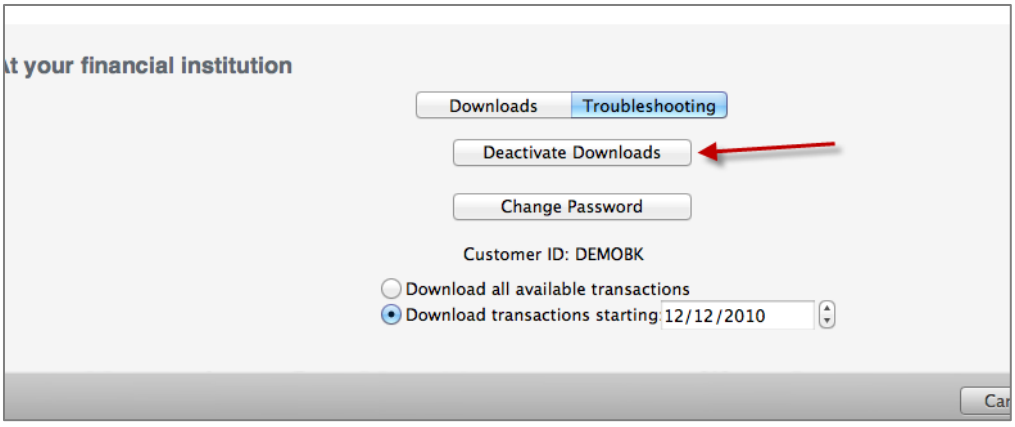
2. Choose **Accounts** menu > **Settings**.



3. In the section "At your financial institution" click **Troubleshooting**



4. Click Deactivate Downloads

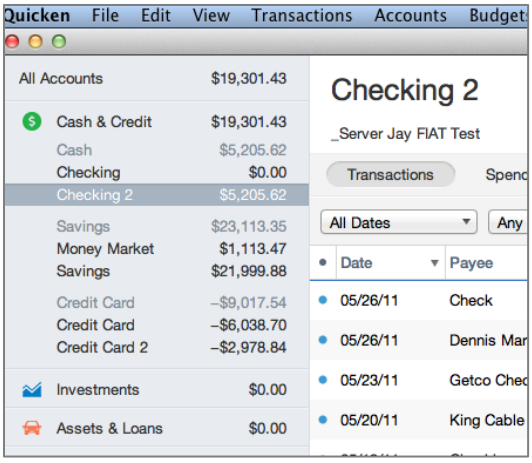


5. Click OK

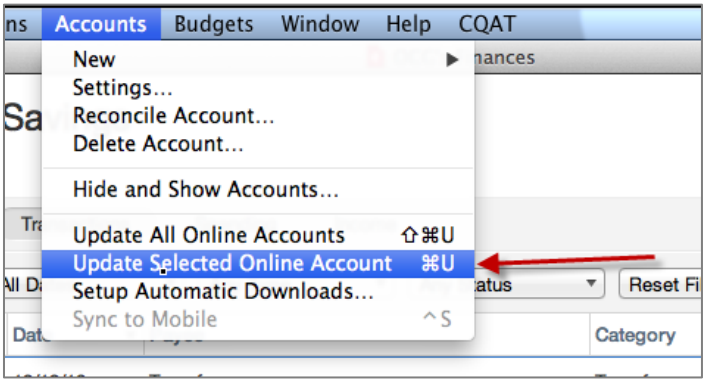
6. Repeat steps 2 – 5 for each account at ***UBS Financial Services Inc.***.

Task 3: Re-enable Your Online Connection for Account (s) at ***UBS Financial Services Inc.***

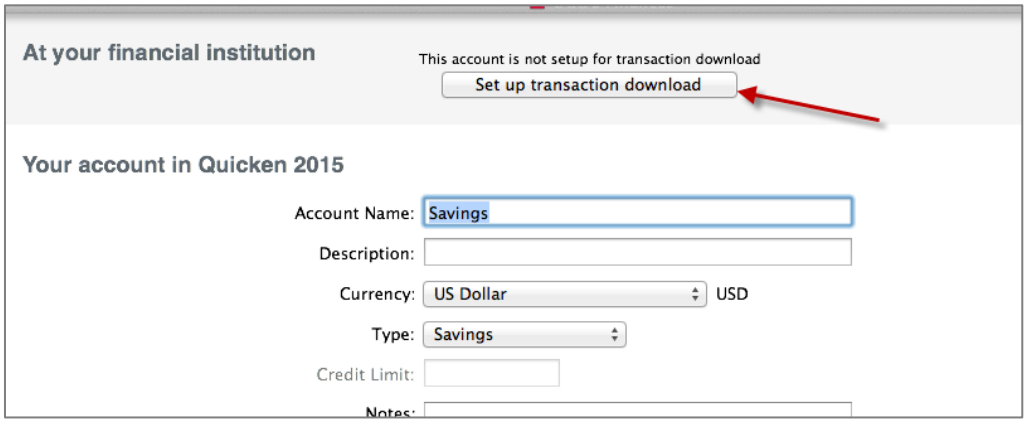
1. Select your account under the **Accounts** list on the left side.



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

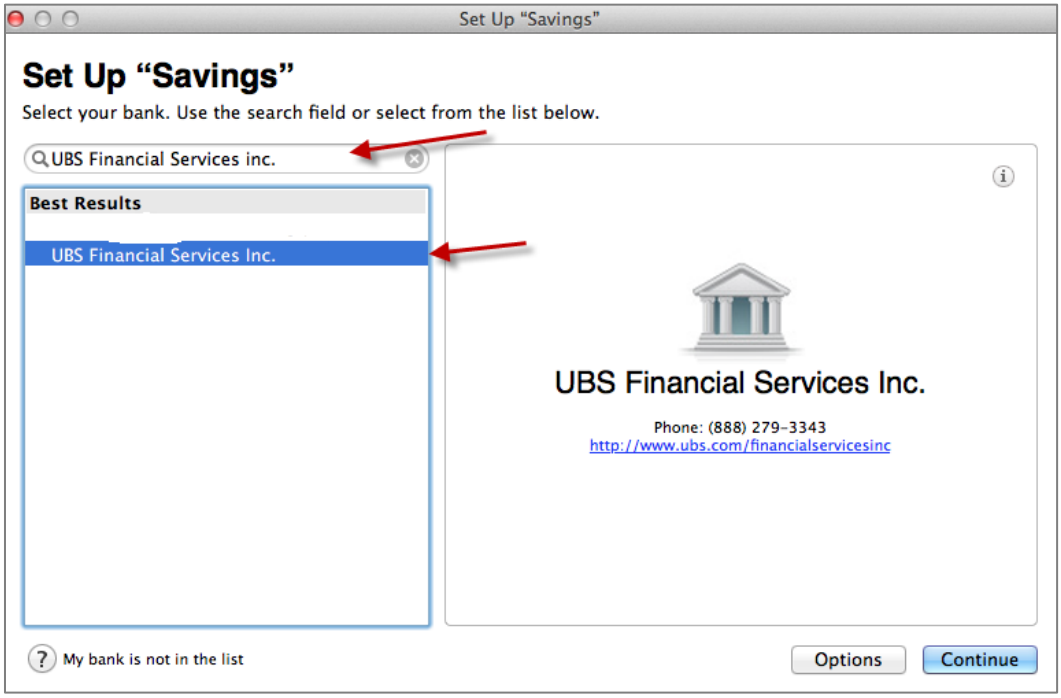


3. Click on **Setup Transaction download** in the section at your financial institution

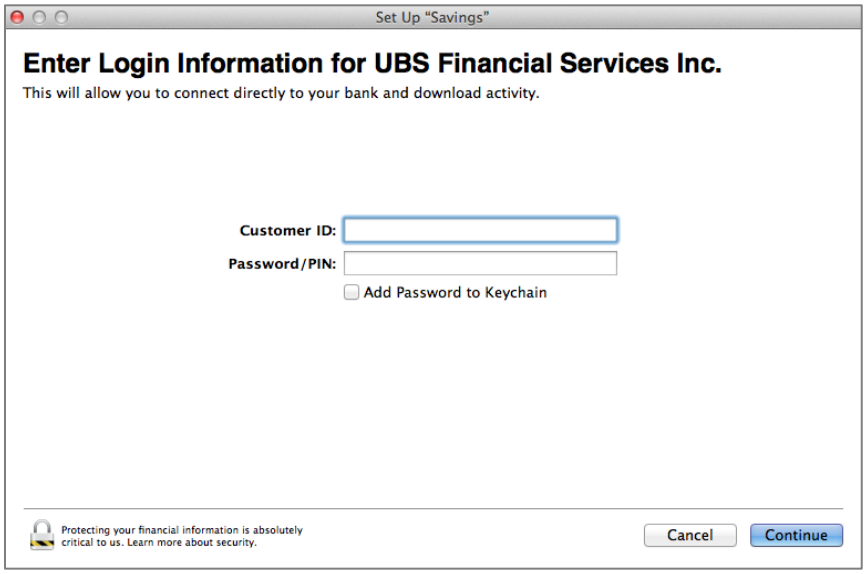


4. Click **OK**

5. Enter ***UBS Financial Services Inc.*** in the Search field and click **Continue**.



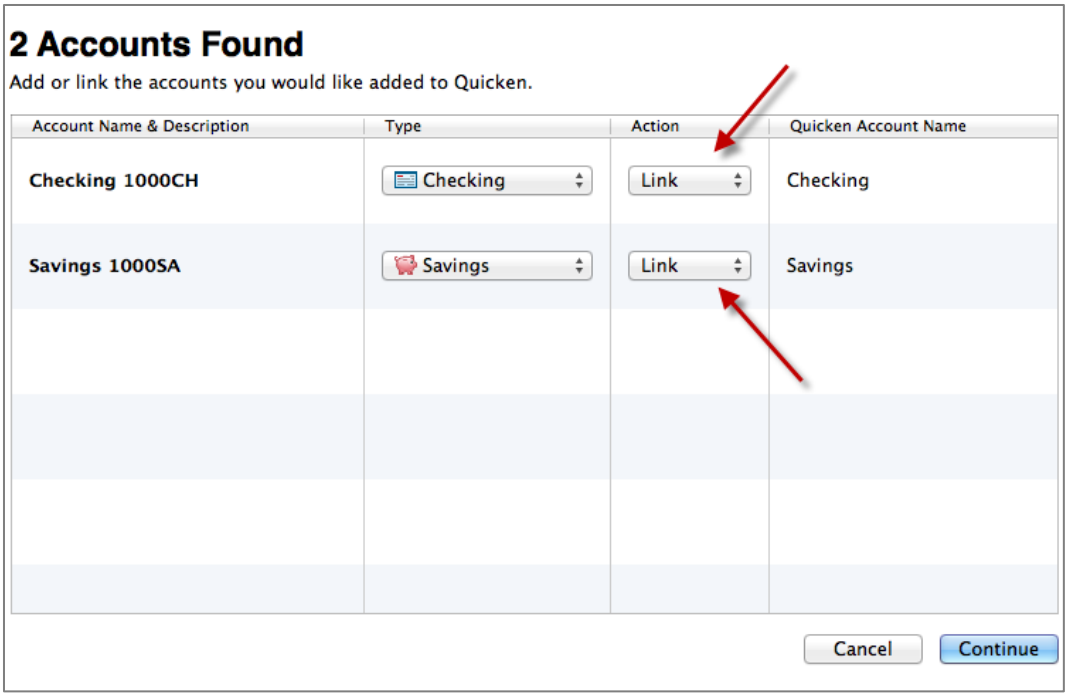
6. Type your UBS Online Services website **User Name** and **Password** and click **Continue**.



7. If the bank requires extra information, enter it to continue.

NOTE:	Select "Direct Connect" for the "Connection Type" if prompted.

8. In the “Accounts Found” screen, ensure you associate each 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.

9. Repeat step 8 for each additional account you wish to download into Quicken.
10. Click **Continue**
11. Click Finish

Thank you for making these important changes!