After you have converted your data

After conversion from other versions of Quicken:

- Remember to reconnect your accounts to your financial institutions.
- If you moved your data from Quicken for Mac 2007 or Quicken for Windows, most information (other than passwords) about the connections between your accounts in Quicken and your financial institutions should have been carried over. However, **it may be necessary to reconnect one or more of your financial institutions for transaction download.** If you are not prompted to do so automatically after initial conversion and setup, choose the Set Up Transaction Download option from the menu bar to get reconnected.
- Quicken supports investment transactions, so all of your history from Quicken Windows or Quicken 2007 will be converted.
- Review your account balances. In most cases, they should be identical to the balances in your old data file. If they look off, see this help topic on troubleshooting balance discrepancies and refer to the Quicken Community for help.

After conversion from another personal finance application:

- Banktivity import issues
- Moneydance import issues