Quicken for Mac 2015-2018 Conversion Instructions

Direct Connect to Web Connect

Introduction

As *Quantum Credit Union* completes its system conversion to its new core operating system, 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 User ID and Password for each Financial Institution.

> **NOTE:** **Direct Connect** may require registration. Please contact *your financial institution* to verify your Direct Connect login information. **Web Connect** uses the same User ID and Password as the *Quantum Credit Union* website.

You should perform the following instructions exactly as described, and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

Documentation and Procedures

Task 1: Disconnect Accounts at *TECU Credit Union* on or after *4/11/2018*

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

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

3. Select **Troubleshooting** > **Deactivate Downloads.**

4. Repeat steps for each account to be disconnected*.*

Task 2: Reconnect Accounts to *Quantum Credit Union* on or after *4/11/2018*

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

6. Choose **Accounts** menu > **Settings**.

7. Select Set up transaction download.

8. Enter *Quantum Credit Union* in the **Search** field, select the name in the **Results** list and click **Continue**.

9. Log in to your online banking at www.TheQ.org*.* **Download** a file of your transactions to your computer.

NOTE:	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.

10. Drag and drop the downloaded file into the box **Drop download file**.

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

11. 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 unless you intend to add a new account to Quicken.

12. Click **Finish**.

13. Repeat steps for each account to be reconnected.