Quicken for Mac 2015-2017 Conversion Instructions

Direct Connect to Express Web Connect

Introduction

As *Sandia Laboratory Federal Credit Union* completes its system conversion, 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.

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!

This detour symbol indicates instructions in a Task specifically for **Bill Pay within Quicken** *(Not available in Quicken for Mac 2015).* If you do **not** use Quicken to make bill payments, skip that Task.

Documentation and Procedures

Task 1: Conversion 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.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for *Updates*, select "Check for Updates," and follow the instructions.

Task 2: Connect to *Sandia Laboratory FCU* for a final download before *3/12/2018*

---

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

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

3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Cancel Outstanding Payments before *3/12/2018 (Not available in Mac 2015)*

⚠️   If you are **not** a Bill Pay user within Quicken, skip this Task.

> **IMPORTANT:**   This Task must be completed to avoid possible duplicate payment. If you do not cancel payments scheduled to be paid on or after *3/12/2018*, these payments may still be processed.

1. Highlight a Bill Payment transaction on the account register.

> **NOTE:**   While on the account register, go to **File** > **Print** to save your list of pending payments. You can use this when you recreate and send these payments later.

2. Click on the **Edit** button located on the action bar at the bottom of the account register window.

3. Click on the **Edit Details** tab located below the highlighted transaction.

4. Click on the **Online Payment** tab.

5. Click on **Cancel Payment**.

6. Repeat steps for each outstanding payment transaction you have with your financial institution.

Task 4: Disconnect Accounts at *Sandia Laboratory FCU - New* on or after *3/13/2018*

---

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 5: Reconnect Accounts to *Sandia Laboratory FCU* on or after *3/20/2018*

---

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

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

3. Select **Set up transaction download.**

4. Enter *Sandia Laboratory FCU* in the **Search** field, select the name in the **Results** list and click **Continue**.

5. Enter your **User Id** and **Password** and click **Continue**.

6. If the Credit Union requires extra information, enter it to continue.

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

7. 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.

8. Select **Finish**.