

Quicken for Windows Conversion Instructions



Quicken for Windows 2013-2016

Direct Connect

Introduction

JSC FCU has completed a system conversion. You will need to modify your Quicken settings to ensure a 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 the **JSC FCU** websites.

NOTE: Direct Connect may require registration. Please contact **JSC FCU** to verify your Direct Connect login information.

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. This conversion should take 15–30 minutes.



This detour symbol indicates a Task for Bill Pay in Quicken. If you do **not** use Quicken to make online bill payments, skip the Task.

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Quicken Help**. Search for **Backup Data File** and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Quicken Help**. Search for **Update Software** and follow the instructions.

Task 2: Deactivate Your Account(s) at **JSC FCU** on or after **7/21/2016**

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you intend to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click on **Deactivate** or **Deactivate Online Payment** (only available if you use bill pay services). Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.

6. Remove the financial institution name and account number. Click **OK** to close the window.
7. Repeat steps for each account you are deactivating.
8. Backup your data file.

Task 3: Re-activate Your Accounts at JSC FCU - on or after 7/21/2016

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to activate.
3. In the Account Details dialog, click on the **Online Services tab**.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter **JSC FCU** and click **Next**. (If **JSC FCU Direct Connect** and **JSC FCU Web Connect** are the only options, please follow the instructions below). Skip to Step 7 if **JSC FCU** is an option.
 - a. If **JSC FCU** is not an option, please exit the window and return to the main page.
 - b. On the main page, please click on **Tools** and click on **add Account**.
 - c. Please click on **Checking** and enter **JSC FCU**.
 - d. If “**JSC FCU**” is an option, please select **JSC FCU** and click **Next**.
 - e. **The next window will ask you to input the credentials. Please leave it blank and exit the window.**
 - f. Return to Step 1.
7. If presented with the Select Connection Method screen, select **Direct Connect**.
8. Type your Direct Connect **User ID** and **Password** and click **Connect**.
9. Be sure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching accounts in the drop-down menu.

IMPORTANT: Do **NOT** select **Add to Quicken** unless you want to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
11. Click **Done** or **Finish**.

Task 4: Re-create Online Payments



If you are not a Bill Pay user in Quicken, your conversion is complete. Skip this Task.

1. Re-create your payments.
2. If you need help creating your payments, choose **Help menu > Quicken Help**.
3. Search for "**Create an online payment**" and click that item.
4. Follow the instructions to enter or transmit an online payment.

Thank you for making these important changes!