Quicken for Mac 2016 Conversion Instructions

Quicken for Mac 2016

Direct Connect

Introduction

JSC FCU has completed a 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 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.

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: Deactivate Your Accounts at *JSC FCU* on or after *7/21/2016*

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 at *JSC FCU*

Task 3: Reactivate Your Accounts at *JSC FCU* on or after *7/21/2016*

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 *JSC FCU* in the **Search** field, select the institution name in the **Results** list and click **Continue**.

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

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

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

7. In the "**Accounts Found**" screen, 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.

8. Select **Finish**.

Task 4: Re-create Online Payments at JSC FCU

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, click on **Help** in the top menu.

3. Search for "**Adding online Bill Pay transactions**" and click that item.

4. Follow the instructions to enter or transmit an online payment.

Thank you for making these important changes!