![Delta Community Credit Union logo]

Quicken for Mac 2015-2017 Conversion Instructions

Direct Connect to Web Connect

Please note, Direct Connect is not subject to the scheduled upgrade downtime and can be reconnected on January 24th

Introduction

As **Delta Community Credit Union** completes its system conversion**,** you will need to modify your Quicken settings to ensure the smooth transition of your data. We have provided detailed steps to help you with this process. Please reference the dates listed for each task, as this information is time sensitive.

To complete these instructions, you will need your User ID and Password for **Delta Community Credit Union**.

> **NOTE:** Direct Connect will require registration. This registration can be completed in Online Banking. Under the **Additional Services** menu, choose **Connectivity for Quicken® and QuickBooks®** to create Direct Connect password. Web Connect uses the same username and password as the **Delta Community Credit Union** website.

It's important to perform these steps as described and in the order presented to ensure your Quicken Connectivity continues to function properly. This process should take approximately 15–30 minutes.

Documentation and Procedures

Task 1: Prepare for conversion <u>before</u> **January 24, 2018**.

1. Backup your data file. For instructions, 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, choose **Help** menu > **Search**. Search for *Updates*, select **Check for Updates** and follow the instructions.

Task 2: Connect to **Delta Community Credit Union** for a final download <u>before</u> **January 24, 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: Disconnect accounts at **Delta Community Credit Union** <u>on or after</u> **January 24, 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 4: Reconnect accounts to **Delta Community Credit Union** <u>on or after</u> **January 24, 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 *Delta Community Credit Union* in the **Search** field, select the name in the **Results** list and click **Continue**.

5. Log in to **Delta Community Credit Union**. **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.

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

> **NOTE:** Select **Web 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.

> **NOTE:** Do not select ADD under the action column unless you intend to add a new account to Quicken.

8. Click **Finish**.

9. Repeat steps for each account to be reconnected.

You're all set! Thank you for being a valued member of Delta Community.