



Quicken for Mac 2007 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 before **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.
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Task 2: Connect to **Delta Community Credit Union** for a final download before **January 24, 2018**.

1. Choose **Online** menu > **Download Transactions**.
2. Select your account from the drop-down list.

3. Click **Download**.
4. Enter your **PIN** and click **OK**.
5. If new transactions display in the **Download Transactions** dialog, then accept them in your Quicken account register.

Task 3: Disconnect accounts at **Delta Community Credit Union** on or before **January 24, 2018**.

1. Choose **Lists** menu > **Accounts**.
2. Select the account that you want to disable and click **Edit**.
3. Write down your account information (account number, routing number, and customer ID).

NOTE: You will need this information to re-enable your account.

4. If you use online payment services, then select **Not Enabled** in the **Pay Bills Online** drop-down list. Follow the prompts to confirm the deactivation.
5. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
6. Remove the information within the **Account Number** and **Routing Number** fields.
7. Click **OK** to save your edits.
8. Repeat steps for each account to be disconnected.
9. Verify that your account list does not display a blue online circle icon for any accounts at **Delta Community Credit Union**.

Task 4: Reconnect accounts to **Delta Community Credit Union** on or after **January 24, 2018**.

1. Download your Quicken Web Connect file from **www.DeltaCommunityCU.com**.

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.

2. Import your transactions to Quicken.
3. Associate the account to the appropriate account already listed in Quicken. Select **Use an existing account**.
4. Match the transactions you are importing to the corresponding existing Quicken account in the drop-down list and click **OK**.
5. Repeat steps for each account to be reconnected.

Choose **Lists** menu > **Accounts**. Verify each account at **Delta Community Credit Union** has a blue online circle indicating it has been reconnected for online services.

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