Quicken Conversion Instructions - *Web Connect*

As *Achieve Financial Credit Union* completes its **NEW** online banking 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.

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!

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 Your Data* and follow the instructions.

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

> **NOTE:** Perform the following tasks only AFTER you have successfully completed the login process to Achieve's **NEW** online banking service.

Task 2: Disconnect Accounts at *Achieve Financial Credit Union* on or after *2-13-18*

IMPORTANT: DO NOT perform this task on a Credit Union VISA credit card account. No action is needed.

Quicken for Windows

1. Choose **Tools** menu > **Account List**.

2. Click the **Edit** button of the account you want to deactivate.

3. In the **Account Details** dialog, click on the **Online Services** tab.

4. Click **Deactivate**. 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 to be disconnected at the Credit Union.

Quicken for Mac 2007

1. Choose **Lists** menu > **Accounts**.

2. Select the account to deactivate and click **Edit**.

3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.

4. Remove the information within the **Account Number** and **Routing Number** fields.

5. Click **OK** to save your edits.

6. Repeat steps 2 – 5 for each account to be disconnected.

7. Verify your account list does not display a blue online circle icon for the accounts you are disconnecting.

Quicken for Mac 2015 - 2017

Quicken for Mac 2015-2017 users do not need to perform this task and proceed to Task 3.

Task 3: Reconnect Accounts on or after *2-13-18*

NOTE:	Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

Quicken for Windows

1. Log into Achieve's *NEW* online banking service and select an account to view. Use the Search function to define the Start Date and End Date of transactions to view transactions.

2. Select the Export Transactions icon and download your Quicken Web Connect file.

3. Upon completion of the download process, you may Open or Save the file. If you save the file to your computer, click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.

4. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

IMPORTANT:	Do **NOT** select **Create a new account** unless you intend 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** or click the **Cancel** button.

5. Repeat steps for each account to be reconnected.

Quicken for Mac 2007

1. Log into Achieve's *NEW* online banking service and select an account to view. Use the Search function to define the Start Date and End Date of transactions to view transactions.

2. Select the Export Transactions icon and download your Quicken Web Connect file.

3. Import your transactions to Quicken.

4. Associate the account to the appropriate account already listed in Quicken. Select **Use an existing account**.

5. Match the transactions you are importing to the corresponding existing Quicken account in the drop-down list and click **OK**.

6. Repeat steps for each account to be reconnected.

7. Choose **Lists** menu > Accounts. Verify each account at *Achieve Financial CU* has a blue online circle indicating it has been reactivated for online services.

Quicken for Mac 2015 – 2017

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 *Achieve Financial CU* in the **Search** field, select the name in the **Results** list and click **Continue**.

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.

5. Log into Achieve's *NEW* online banking service and select an account to view. Use the Search function to define the Start Date and End Date of transactions to view transactions.

6. **Download** a file of your transactions to your computer.

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

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

8. 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 unless you intend to add a new account to Quicken.

9. Click **Finish**.

10. Repeat steps for each account to be connected.