

Quicken for Mac 2007 Conversion Instructions



Web Connect

Introduction

As UT Federal Credit Union (UTFCU) completes its 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.

To complete these instructions, you will need your Login ID and Password for UTFCU online banking.

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.

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 Your Data**," and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates**, select "**Checking for Updates to Quicken**," and follow the instructions.

Task 2: Disconnect Accounts at UTFCU on or after **12/12/2017**

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.

Task 3: Connect Accounts at UTFCU on or after **12/12/2017**

1. Download your Quicken Web Connect file from UTFCU online banking at www.utfcu.org.

NOTE: Take note of the date you last had a successful connection. If you have overlapping dates in the Web Connect import, 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.
6. Choose **Lists** menu > Accounts. Verify each account at UTFCU has a blue online circle indicating it has been reactivated for online services.

Thank you for making these important changes!