

Quicken for Mac 2007 Conversion Instructions



Web Connect to Direct Connect

Introduction

As **Great Basin Federal Credit Union** completes its 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 each Financial Institution.

NOTE: **Express Web Connect** uses the same User ID and Password as the **Great Basin Federal Credit Union** website. **Direct Connect** for **Great Basin FCU** requires registration. Log into Online Banking. Click **Additional Services**, then **Connectivity for Quicken and QuickBooks**. Set the password you plan to use with your Intuit products. You will need to use your Online Banking User ID and this new password when connecting.

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**, 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 **Check for Updates**, and follow the instructions.

Task 2: Disconnect Accounts At **Great Basin Federal Credit Union** on or after **04/18/18**

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 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: Reconnect Accounts to *Great Basin FCU* on or after 04/18/18

1. Choose **Lists** menu > **Accounts**.
2. Select your first disabled account and click **Edit**.
3. Click the **Financial Institution** drop-down list and select **Change Financial Institution**.
4. Click on **Update List**.
5. In the **Financial Institutions** dialog, enter, then select **Great Basin FCU** from the list and click **Use**.
6. Enter your Direct Connect **User ID** and **Password**. Click **OK**.
7. In the **Add Online Services** dialog, match your first account to the appropriate account number. Click **OK**.

NOTE: Each account will be displayed below **"Use an existing account."**

8. Click **OK**.
9. Click OK to close the **Edit Register** page.
10. Choose **Lists** menu > **Accounts**. Verify that each account you are reconnecting has a blue online circle for online services.