



# Quicken for Windows Conversion Instructions

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*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

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**Task 1:** Conversion Preparation

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1. Back up 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.

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

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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.

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**Task 3:** Reconnect Accounts to **Great Basin FCU** on or after **04/18/18**

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1. Choose Tools menu > Account List.
2. Click the Edit button of the account you want to activate.
3. In the Account Details dialog, click on the Online Services tab.
4. Click Set up Now.
5. Use Advanced Setup to activate your account.
6. Enter **Great Basin FCU** in the search field, select the name in the list and click Next.
7. If presented with the Select Connection Method screen, select **Direct Connect**.
8. Type your Direct Connect **User ID** and **Password** and click **Connect**.
9. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link** to an existing account and select the matching accounts in the drop-down menu.

**IMPORTANT:** Do **NOT** select **Add to Quicken** unless you want 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**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.

11. Click **Done** or **Finish**.