# Quicken for Mac Conversion Instructions

*Quicken for Mac 2015/2016*

*Direct Connect to Express Web Connect*

## Introduction

As *Mid-Atlantic FCU* 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 the *Mid-Atlantic FCU* website.

> **NOTE:** Quicken Web Connect/Express Web Connect accounts use the same User ID and PIN/Password as the *Mid-Atlantic FCU* website.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service 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 data files**, 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:** Deactivate Your Account(s) At *Mid-Atlantic FCU* on or after *06/07/17*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Settings**.

3. Select **Troubleshooting** > **Deactivate Downloads.**

4. Repeat steps for each account at *Mid-Atlantic FCU.*

**Task 3:** Re-activate Your Account(s) At *Mid-Atlantic FCU* on or after *06/14/17*

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 *Mid-Atlantic Fed CU-BB QB* in the **Search** field, select the name in the **Results** list and click **Continue**.

5. Enter your **User Id** and **Password** and click **Continue**.

6. If the bank requires extra information, enter it to continue.

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

7. 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.

8. Select **Finish**.

*Thank you for making these important changes!*

# Quicken for Windows Conversion Instructions



*Quicken for Windows 2013-2015*

*Direct Connect to Express Web Connect*

## Introduction

As *Mid-Atlantic FCU* 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 the *Mid-Atlantic FCU* website.

| | |
|---|---|
| **NOTE:** | Quicken Web Connect/Express Web Connect accounts use the same User ID and PIN/Password as *Mid-Atlantic FCU* website. |

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

 This detour symbol indicates a Task for Bill Pay in Quicken. If you do not use Quicken to make online bill payments, skip the Task.

## Documentation and Procedures

**Task 4:** Conversion Preparation

9.  Backup your data file. For instructions to back up your data file, choose **Help** menu > **Quicken Help**. Search for *Backup Data File* and follow the instructions.

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

**Task 5:** Cancel Outstanding Payments before *05/31/17*

 If you are not a Bill Pay user in Quicken, skip this Task.

> **IMPORTANT:** This step must be completed by *05/31/17* to avoid possible duplicate payment. If you do not cancel payments scheduled to be paid after *05/31/17,* it is possible these payments will still be processed.

1. Choose **Tools** menu > **Online Center**.

2. Select *Mid-Atlantic FCU* from the **Financial Institution** drop-down list.

3. On the **Payments** tab, select an account from which a payment is scheduled in the future.

> **NOTE:** Click **Print** to save your list of pending payments. You can use this when you recreate and send these payments later.

4. In the payment status list, you will cancel payments for each payee with a status that is schedule for delivery on a date after *05/31/17.* To do this, select the first payee and click **Cancel Payment**.

5. Perform steps 3 & 4 for all payments scheduled for delivery on a date after *05/31/17*.

6. On the toolbar, choose **Repeating**.

7. Select a payment instruction and click **Delete**. You will need to click **Delete** again in a confirmation window.

8. Repeat step 7 for each repeating payment instruction you have with your financial institution.

---

**Task 6:** Deactivate Your Account(s) At *Mid-Atlantic FCU* on or after *06/07/17*

---

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 on **Deactivate** or **Deactivate Online Payment** (only available if you use bill pay services). 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 2 – 6 for each account at *Mid-Atlantic FCU*.

8. Backup your data file.

---

**Task 7:** Re-activate Your Account(s) at *Mid-Atlantic FCU* on or after *06/14/17*

---

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 *Mid-Atlantic FCU* and click **Next**.

7. If presented with the Select Connection Method screen, select **Express Web Connect**.

8. Enter your **User ID** and **Password**. Click **Connect**.

> **NOTE:** You may be presented with a security question from your Financial Institutions prior to receiving your accounts.

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 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**.

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

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

*Thank you for making these important changes!*