

# Quicken for Mac Conversion Instructions

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*Quicken for Mac 2015-2016*

*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 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.

## Documentation and Procedures

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### Task 1: Conversion Preparation

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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.

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### Task 2: Deactivate Your Account(s) at **Mid-Atlantic FCU** on or after **06/07/17**

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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**.

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

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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

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*Quicken for Windows 2013-2016*

*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.

## Documentation and Procedures

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### Task 4: Conversion Preparation

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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.

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### Task 5: Deactivate Your Accounts at **Mid-Atlantic FCU** on or after **06/07/17**

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11. Choose **Tools** menu > **Account List**.
12. Click the **Edit** button of the account you want to deactivate.
13. In the **Account Details** dialog, click on the **Online Services** tab.
14. Click **Deactivate**. Follow the prompts to confirm the deactivation.

15. Click on the **General** tab.
16. Remove the financial institution name and account number. Click **OK** to close the window.
17. Repeat steps 2—6 for each account to be deactivated.

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**Task 6:** Re-activate Your Accounts at *Mid-Atlantic FCU* on or after **06/14/17**

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18. Choose **Tools** menu > **Account List**.
19. Click the **Edit** button of the account you want to activate.
20. In the Account Details dialog, click on the **Online Services** tab.
21. Click **Set up Now**.
22. Use **Advanced Setup** to activate your account.
23. Enter *Mid-Atlantic Fed CU-BB QB* and click **Next**.
24. If presented with the Select Connection Method screen, select **Express Web Connect**.
25. 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.

26. 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**.

27. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
28. Click **Done** or **Finish**.

*Thank you for making these important changes!*

# QuickBooks Online Edition Conversion Instructions

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*QuickBooks Online Edition (QBO V78)*

## Introduction

As **Mid-Atlantic Fed CU-BB QB** completes its system conversion, you will need to modify your QuickBooks Online Edition 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 Fed CU-BB QB** 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

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### Conversion – Information only

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QuickBooks Online data is stored on Intuit servers in the cloud. Since we update your records with every change, we cannot restore your file to a previous point in time.

QuickBooks Online automatically updates your selected version so you are always on the latest release.

**IMPORTANT:** QuickBooks Online edition connectivity services may be interrupted up to 3-5 business days after the conversion is complete.

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### **Task 7:** Deactivate Your Account(s) At **Mid-Atlantic Fed CU-BB QB** on or after **06/07/17**

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29. Choose **Transactions > Banking**.
30. Click on the account you'd like to disconnect, then click the **Pencil Icon**.
31. Click on **Edit Account Info**.
32. Check the box next to **Disconnect this account on save**.

33. Click **Save**.
34. Repeat steps 2—6 for each account at *Mid-Atlantic Fed CU-BB QB*.

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**Task 8:** Re-activate Your Account(s) at *Mid-Atlantic Fed CU-BB QB* on or after *06/14/17*

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35. Choose **Transactions > Banking**.
36. In the upper right corner, click **Add Account**
37. Enter *Mid-Atlantic Fed CU-BB QB*, and click **Find**.
38. Click the link for *Mid-Atlantic Fed CU-BB QB*.
39. Type your **User ID** and **Password**. Click **Log In**.
40. Ensure you associate the account for *Mid-Atlantic Fed CU-BB QB* to the appropriate account already listed under **QuickBooks Accounts**. You will want to select the matching accounts in the drop-down menu.

**IMPORTANT:** Do **NOT** select **+Add new**. If you are presented with accounts you do not want to track in this data file, **Uncheck** the box next to the **Account name**.

41. After all accounts have been matched, click **Connect**.
42. When the download is finished click **I'm done. Let's go!**

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**Task 9:** Excluding Duplicate Transactions

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43. Choose **Transactions > Banking**.
44. In the **New Transactions** section, click the checkboxes for the transactions you want to exclude.
45. Click **Batch Actions > Exclude Selected**.

**NOTE:** If you accidentally exclude a transaction, you can include it again.

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**Task 10:** Undo Excluded Transactions

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1. Choose **Transactions > Banking**.
2. Click the **Excluded** tab.
3. Click the checkboxes for the transactions you want to include.
46. Click **Batch Actions > Undo**.

47. Transactions will appear again in the **New Transactions** tab for you to work with.

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Additional Instructions: Manually Import Transactions

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48. Log in to *Mid-Atlantic Fed CU-BB QB* website at [www.mafcu.org](http://www.mafcu.org).
49. Download one of the following Web Connect files.
  - a. .qbo (QuickBooks)
  - b. .qfx (Quicken)
50. In **QuickBooks Online**, choose **Transactions > Banking**.
51. In the upper right corner, click **File Upload**.
52. Click Browse and select *Mid-Atlantic Fed CU-BB QB* Web Connect file from your computer.
53. Click **Next**.
54. In the drop-down menu, select the account where you'd like to upload the transactions.
55. When the download is finished click **I'm done. Let's go!**
56. After your download finishes, click the **New Transactions** tab to see what was downloaded.

*Thank you for making these important changes!*

# Mint Conversion Information

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*Mint.com (V40)*

## Introduction

As **Mid-Atlantic FCU** completes its system conversion, Mint aggregation services may be interrupted for up to 5 business days.

**NOTE:** You will be able to access online banking information by directly logging into your financial institution website during the interrupted time.


## Mint Conversion Information

Mint.com data is stored on Intuit cloud servers. Data is updated with every change and cannot restore data to a previous point in time.

For a successful account update, do not login into Mint.com for **Mid-Atlantic FCU** until 5 business days after **06/07/17**.

During this time, the Mint.com server will automatically make the system conversion for your activated accounts. If you login into Mint.com during this time, you may see duplicate accounts or an error displayed. Please do not attempt to change the status or make any changes in Mint.com during this time. After 5 business days, the accounts should reconcile showing your transaction history available.

In the event that your accounts do not display current transactions after 5 business days, you

may log back into Mint.com and click refresh  to update the account. After the download completes, click the Transactions tab to view up to 90 days of transaction history.

***Thank you for your patience during these changes!***