

# QuickBooks for Mac Conversion Instructions

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## QuickBooks for Mac

### Direct Connect

## Introduction

Because we have changed our name to **Desert Financial Credit Union**, you may need to modify your Quicken/QuickBooks settings. If you have an active online banking account but haven't logged into Quicken or QuickBooks since **May 22<sup>nd</sup>, 2017**, please follow the instructions below; you will need your online banking login and password.

It is important that you follow these instructions as they are described and in the order that they appear. If you do not, your Quicken/QuickBooks service may stop functioning properly. This conversion will take you about 15–30 minutes to complete.

## 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 and use the Search bar available at the top. Search for **Back Up** and follow the instructions on screen. The first time you do a backup, QuickBooks will guide you through setting backup preferences.
2. Download the latest QuickBooks Update. For instructions to download an update, choose **Help menu** and use the Search bar available at the top. Search for **Update QuickBooks**, select **Check for QuickBooks Updates** and follow the instructions.

### Task 2: Match Downloaded Transactions

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If new transactions were received from your connection, accept all new transactions into the appropriate registers.

If you need assistance matching transactions, choose the **Help** menu and use the Search bar available at the top. Search for **Updating Your Register**, select the article with that name and follow the instructions.

### Task 3: Deactivate Your Account(s) at **Desert Schools Federal Credit Union**

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**NOTE:** All transactions must be matched or added to the register prior to the deactivating of your account(s).

1. Choose **Lists** menu > **Chart of Accounts**.
2. Select the account you want to deactivate.
3. Choose **Edit** menu > **Edit Account**.
4. In the **Edit Account** window, click the **Online Settings** button.

5. In the **Online Account Information** window, choose **Not Enabled** from the **Download Transactions** list and click **Save**.
6. Click **OK** for any dialog boxes that may appear with the deactivation.
7. Repeat steps 2 – 6 for each account at **Desert Schools Federal Credit Union**.

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**Task 4: Re-activate Your Account(s) at *Desert Financial Credit Union***

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1. Choose **Banking** menu > **Online Banking Setup**.
2. Select **Desert Financial Credit Union** from the **Financial Institution** list and click **Next**.
  - a. If you do not see Desert Financial Credit Union in the list that comes back or if you get an error that the institution cannot be found, follow this link, <https://community.intuit.com/articles/1578692-error-olsu-1024-or-olsu-1022-when-creating-an-account-for-bank-feeds>. Once on the webpage, complete the Solutions steps and try again.
3. Follow the instructions in the wizard. If prompted for connectivity type, select **Direct Connect**.
4. The Online Banking Assistant window displays during setup. Select **Yes, my account has been activated for QuickBooks online services**, then click **Next**.
5. Enter credentials and click **Sign In**.
6. For each account you wish to download into QuickBooks, click **Select an Account** to connect to the appropriate existing account register.

**IMPORTANT:** Do **NOT** select “**New**” under the action column.

7. Click **Next**.
8. Click **Done**.

***Thank you for making these important changes!***