

Quicken for Windows Conversion Instructions

Quicken for Windows

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 22nd, 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.



This detour symbol indicates section instructions that are using bill pay in Quicken only. If you do **not** use Quicken to make online bill payments, you can skip these sections or steps.

Documentation and Procedures

Task 1: Conversion Preparation

1. 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.
2. 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 2: Cancel Outstanding Payments



If you are **not** a bill pay user in Quicken, please skip this section.

1. Choose **Tools** menu > **Online Center**.
2. Select **Desert Schools Federal Credit Union** 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.

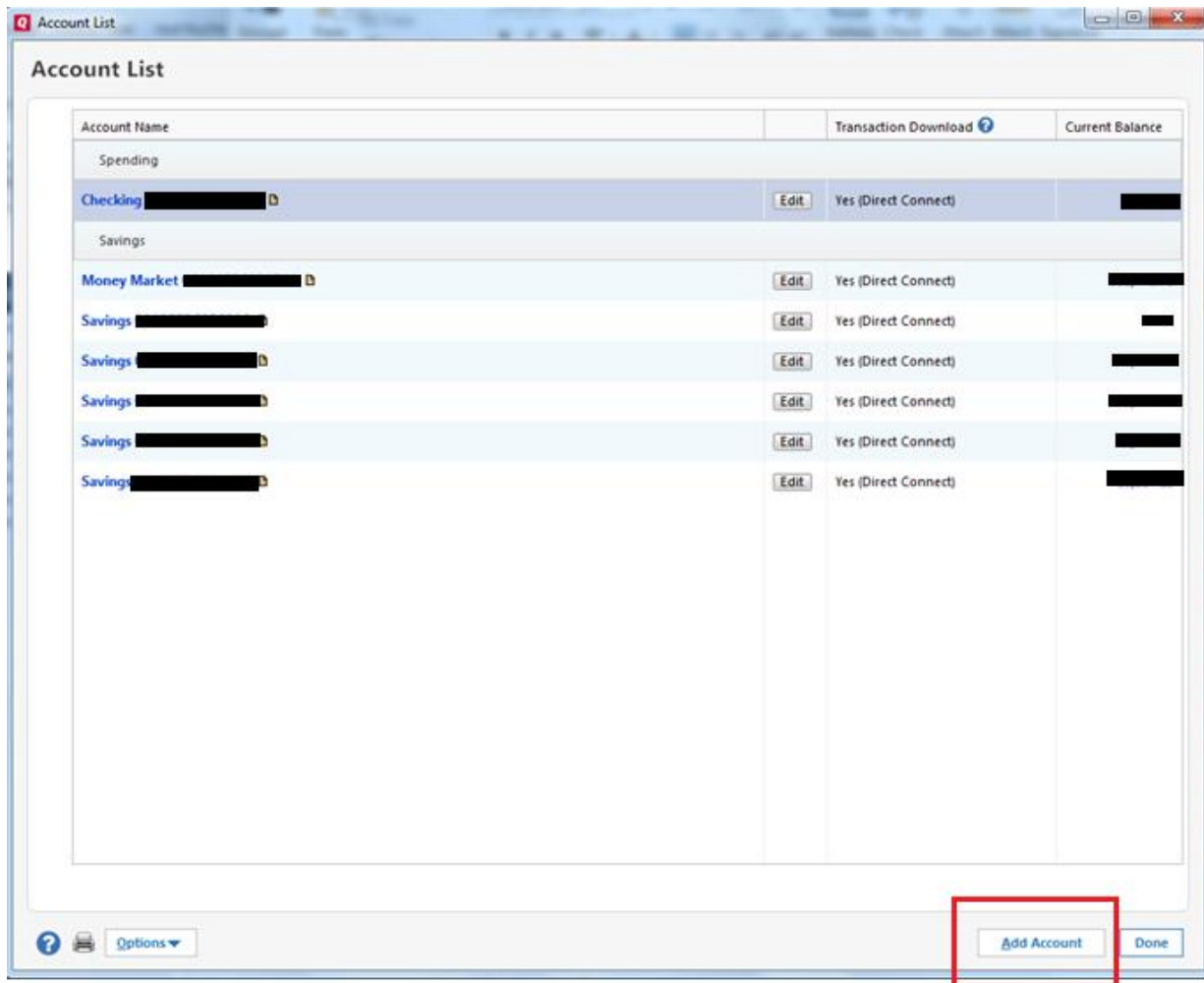
4. In the payment status list, you will cancel payments for each payee with a status that is schedule for delivery on a date after **4/1/2017**. To do this, select the first payee and click **Cancel Payment**.
5. On the toolbar, choose **Repeating**.
6. Select a payment instruction and click **Delete**. You will need to click **Delete** again in a confirmation window.
7. Repeat step 7 for each repeating payment instruction you have with your financial institution.

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

1. Before deactivating your accounts, please ensure all emails have been deleted from the Online Center. The Online Center is located under the **Tools** menu.
2. Choose **Tools** menu > **Account List**.
3. Click the **Edit** button of the account you want to deactivate.
4. In the **Account Details** dialog, click on the **Online Services** tab.
5. Click on **Deactivate**. Follow the prompts to confirm the deactivation.
6. Click on the **General** tab.
7. Remove the financial institution name and account number. Click **OK** to close the window.
8. Repeat steps 2 – 6 for each account at *Desert Schools Federal Credit Union*. Please ensure this step is followed for all Hidden Accounts.

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

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 *Desert Financial Credit Union* and click **Next**. *If you are not able to locate the correct name for Desert Financial Credit Union, please close the Activate One Step Update screen. This will take you back to the Account list. Please select the **Add an Account** button in the lower right hand corner of the **Account List** window (see below picture). On the **Add Account** screen select **Checking** under **Spending & Savings**, and then you will be able to search for the correct Financial Institution name- *Desert Financial Credit Union*



7. Type your **User ID** and **Password** and click **Connect**.
8. 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**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

9. After all accounts have been matched, click **Next**. You will receive confirmation that your account(s) have been added.
10. Click **Done** or **Finish**.

Thank you for making these important changes!