

Quicken for Mac Conversion Instructions

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 instructions in a Task specifically for **Bill Pay within Quicken (Bill Pay is not available in Quicken for Mac 2015.)** If you do **not** use Quicken to make bill payments, skip that Task.

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: Cancel Outstanding Payments



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

1. Highlight a Bill Payment transaction on the account register.

NOTE: While on the account register, go to **File > Print** to save your list of pending payments. You can use this when you recreate and send these payments later.

2. Click on the **Edit** button located on the action bar at the bottom of the account register window.

3. Click on the **Edit Details** tab located below the highlighted transaction.
4. Click on the **Online Payment** tab.
5. Click on **Cancel Payment**.
6. Repeat steps for each outstanding payment transaction you have with your financial institution.

Task 3: Disconnect Accounts at *Desert Schools Federal Credit Union*

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 to be disconnected.

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

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 ***Desert Financial Credit Union*** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
5. Enter your DS OLB **User Id** and **Password** and click **Continue**.
6. In the “**Accounts Found**” screen, associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select “**Link**” to pick your existing account.
 - a. After you click **Next**, if you encounter a prompt that states the software could not find “Desert Financial Credit Union” please proceed to step 7 to update your Quicken files and the issue will be resolved.
7. To update your Quicken Files click this link, <https://www.quicken.com/support/quicken-2017-windows-release-notes-updates-and-mondo-patch>. Once on the webpage, click “Download the Mondo Patch Update” and follow the Instructions.
 - a. Once you have completed the update please proceed back to Task 4, Step 6.

IMPORTANT: Do **NOT** select “**ADD**” under the action column unless you intend to add a new account to Quicken.

8. Select **Finish**.