Quicken for Mac Conversion Instructions

Quicken for Mac 2015

Web Connect to Direct Connect

Introduction

As ***MidWest America 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 ***Username and Password*** for the ***MidWest America FCU*** website at https://banking.mwafcu.org.

NOTE:	Direct Connect may require registration. Please contact ***MidWest America FCU*** to verify your Direct Connect login information.

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 ***MidWest America FCU***

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 ***MidWest America FCU.***

Task 3: Re-activate Your Account(s) at ***MidWest America FCU*** on or after ***August 29, 2016***

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 ***MidWest America FCU*** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
5. Enter your Direct Connect **Username** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

NOTE: Select "Direct Connect" for the "Connection Type" if prompted.

7. 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.

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

8. Select **Finish**.

Thank you for making these important changes!