Quicken for Windows Conversion Instructions

Quicken for Windows 2013-2016

Express 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 > **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. If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

Task 2: Deactivate Your Account(s) At ***MidWest America FCU***

1. Choose **Tools** menu > **Account List**.

2. Click the **Edit** button of the account you want to deactivate.

3. In the **Account Details** dialog, click on the **Online Services** tab.

4. Click **Deactivate.** Follow the prompts to confirm the deactivation.

5. Click on the **General** tab.

6. Remove the financial institution name and account number. Click **OK** to close the window.

7. Repeat steps 2—6 for each account to be deactivated.

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

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 ***MidWest America FCU*** and click **Next**.
7. If presented with the Select Connection Method screen, select **Direct Connect**.
8. Type your Direct Connect **Username** and **Password** and click **Connect**.
9. 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 want 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**.

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

Thank you for making these important changes!