

## Quicken for Windows Conversion Instructions

Web Connect

## Introduction

As **New Orleans Firemen's 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 login credentials for online banking.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

## **Documentation and Procedures**

Task 1: Conversion Preparation

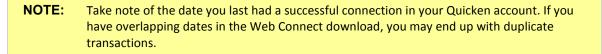
 Backup your data file. For instructions to back up your data file, choose Help menu > Search. Search for Backing Up Your Data and follow the instructions.  Download the latest Quicken Update. For instructions to download an update, choose Help menu > Search. Search for Update Software and follow the instructions.

Task 2: Disconnect Accounts in Quicken on or after 04/16/2020

- 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 for each account to be disconnected.

Task 3: Reconnect Accounts to *New Orleans Firemens FCU* on or after 04/16/2020

1. Download your Quicken Web Connect file from <a href="https://www.noffcu.org/">https://www.noffcu.org/</a>



- 2. Click **File > File Import > Web Connect File**. Locate and select the Web Connect file to import.
- 3. Import Downloaded Transactions window opens: Select Link to an existing account and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

Do **NOT** select **Create a new account** unless you intend 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** or click the **Cancel** button.

4. Repeat steps for each account to be reconnected.