InTouch CREDIT UNION

## Quicken Web Connect Conversion (*April 2024*)

# Quicken Windows Web Connect

On or before April 15, 2024:

1. Backup Quicken Windows Data File and Update.

    a. Choose **File > Backup and Restore > Backup Quicken File.**

    b. Download the latest Quicken Update. Choose **Help > Check for Updates.**

2. Complete a final transaction download.

    a. Complete last transaction update before the change to get all of your transaction history up to date.

    b. Repeat this step for each account you need to update.

    c. Accept all new transactions into the appropriate registers.

Once the conversion is completed:

1. Deactivate online banking connection for accounts connected to financial institution that is requesting this change.

    a. Choose **Tools > Account List.**

    b. Click **Edit** on the account to deactivate.

    c. In Account Details, click **Online Services**.

    d. Click **Deactivate**. Follow prompts to confirm deactivation.

    e. Click the **General** tab.

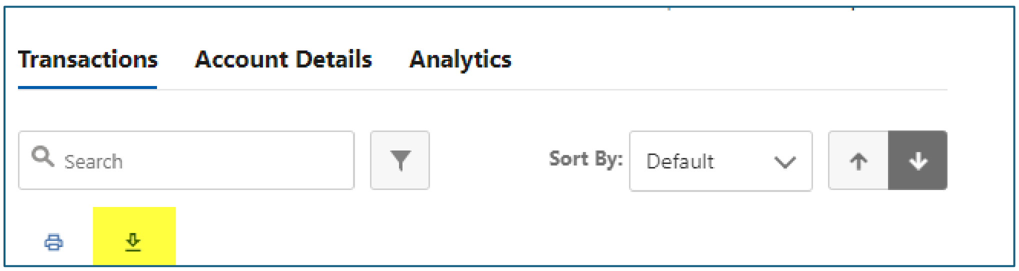
    f. Delete Financial Institution and Account Number information.

    g. Click **OK** to close window.

h. Repeat steps for any additional accounts.

2. Reconnect online banking connection for accounts that apply.

a. Download a Quicken Web Connect file from your financial institution’s online banking site. You can find this option by following **Login > Accounts > Select Account > and then clicking the “download” arrow icon under the Search box.** (Please see the below screenshot.)




b. In Quicken, choose **File > File Import > Web Connect (.QFX) File.**

c. Use the import dialog to select the Web Connect file you downloaded. An “Import Downloaded Transactions” window opens.

d. Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

e. Repeat this step for each account you have connected to this institution.

# Quicken Mac Web Connect

On or before April 15, 2024:

1. Backup your Quicken Mac data file and update the application.

    a. Choose **File > Save a Backup**.

    b. Download the latest Quicken Update. Choose **Quicken > Check for Updates.**

2. Complete a final transaction download.

    a. Complete last transaction update before the change to get all of your transaction history up to date.

    b. Repeat this step for each account you need to update.

    c. Accept all new transactions into the appropriate registers.

Once the conversion is completed:

**Activate online banking connection for accounts connected to financial institution that is requesting this change.**

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings.**
3. Select **Set up transaction download**.
4. Enter your financial institution name in the search field, select the correct option and click **Continue**.
5. Log into your financial institutions online banking site and download your transactions to your computer.

**Important: Take note of the date you last had a successful connection**. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

6. Drag and drop the downloaded file into the box titled D**rop download file**. Choose **Web Connect** for the “Connection Type” if prompted

7. In the “Accounts Found” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, click Link to pick your existing account.

**Important: Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken.**

8. Click **Finish**