



# Quicken for Mac 2015-2017 Conversion Instructions

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## *Direct Connect*

### Introduction

As **American Broadcast EFCU** completes its system conversion you will need to modify your Quicken settings to ensure the smooth transition of your data.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

**NOTE:** Direct Connect require registration. Please follow the instructions below or contact your financial institution to verify your Direct Connect login information.

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!***



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.

In order to set up **Direct Connect Login for Quicken** a separate password must be created for **American Broadcast EFCU Q**

Sign into your Home banking account as normal

Go to **Additional Services** tab

Click on **Connectivity for Quicken and Quickbooks**

Enter a separate Direct Connect password and re-enter (cannot be same password used for Home banking)

Agree to Terms and Conditions

### Connectivity password for Quicken® and QuickBooks®

Create  
Password:

Re-enter  
Password:

Once password is created message below should appear

**You are enrolled to use online services through Quicken® or QuickBooks®. Enter your password selected during the enrollment process to begin accessing your accounts.**

Once completed you may resume setup for Quicken or QuickBooks (Quicken and Quickbooks software purchased separately)

Follow instructions below from Quicken Application

## Documentation and Procedures

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### Task 1: Conversion Preparation

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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.

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### Task 2: Cancel Outstanding Payments *(Not available in Mac 2015)*

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

**IMPORTANT:** This Task must be completed to avoid possible duplicate payment. If you do not cancel scheduled payments these payments may still be processed.

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.

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### Task 3: Disconnect Accounts at **American Broadcast EFCU**

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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.

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### Task 4: Reconnect Accounts to **American Broadcast EFCU Q**

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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 **American Broadcast EFCU Q** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
5. Type your **Account number (for user ID)** and **Direct Connect Password**. (created in prior steps) Click **Connect**.
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**.

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**Task 5: Recreate Online Payments to *American Broadcast EFCU Q* (Not available in Mac 2015)**

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If you are **not** a Bill Pay user within Quicken, your conversion is complete. Skip this Task.

1. Recreate your payments.
2. If you need help creating your payments, click on **Help** in the top menu.
3. Search for "**Adding online Bill Pay transactions**" and click that item.
4. Follow the instructions to enter or transmit an online payment.