



Quicken for Windows Conversion Instructions

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 requires 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**. If you do **not** use Quicken to make online 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 or Quickbooks software purchased separately)

Follow instructions below from Quicken Application

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.
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Task 2: Cancel Outstanding Payments



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. Choose **Tools** menu > **Online Center**.
2. Select **American Broadcast EFCU** from the **Financial Institution** drop-down list.
3. On the **Payments** tab, select an account from which a payment is scheduled in the future.

NOTE: Click **Print** to save your list of pending payments. You can use this when you recreate and send these payments later.

4. In the payment status list, you will cancel payments for each payee with a status that is scheduled for delivery. To do this, select the first payee and click **Cancel Payment**.
5. Perform steps 3 & 4 for all payments scheduled for delivery.
6. On the toolbar, choose **Repeating**.
7. Select a payment instruction and click **Delete**. You will need to click **Delete** again in a confirmation window.
8. Repeat step 7 for each repeating payment instruction you have with your financial institution.

Task 3: Disconnect Accounts at *American Broadcast EFCU*

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you intend to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click on **Deactivate** or **Deactivate Online Payment** (only available if you use bill pay services). 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 you are disconnecting.

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

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 the **Online Services** tab.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter *American Broadcast EFCU Q* in the search field, select the name in the list and click **Next**.
7. If presented with the Select Connection Method screen, select **Direct Connect**.
8. Type your **Account number (for user ID)** and **Direct Connect Password (you Created in prior steps)** 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.
10. Do NOT choose **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, choose **Ignore – Don't Download into Quicken**.
11. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
12. Click **Done** or **Finish**.

Task 5: Recreate Online Payments to *American Broadcast EFCU Q*



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, choose **Help menu > Quicken Help**.
3. Search for “**Create an online payment**” and click that item.
4. Follow the instructions to enter or transmit an online payment.