

Quicken for Mac 2015-2017 Conversion Instructions

Web Connect

Introduction

As OCCU completes its online banking 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 OCCU Internet Banking user ID and password.

NOTE: **Web Connect** uses the same user ID and password as OCCU Internet Banking.

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

Thank you for making these important changes!

Task 1: Conversion preparation

1. Back up 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.

Task 2: Log in to Quicken for a final download before **Monday, May 20, 2019**.

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Sign in to Internet Banking and download transactions for an account.
4. Import the transactions.
5. Repeat steps for each account (such as checking, savings, credit cards and brokerage) that you use for online banking or investing.

Task 3: Reconnect accounts at **OCCU** on or after **Tuesday, May 21, 2019**.

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 **OCCU** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Log in to the new MyOCCU Online & Mobile and **Download** a file of your transactions to your computer.

NOTE: 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 **Drop download file**.

NOTE: Select “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, 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. Click **Finish**.
9. Repeat steps for each account to be connected.