



# Quicken for Windows Conversion Instructions

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## Direct Connect

*Please note, Direct Connect is not subject to the scheduled upgrade downtime and can be reconnected on January 24th*

## Introduction

As **Delta Community Credit Union** completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. We have provided detailed steps to help you with this process. Please reference the dates listed for each task, as this information is time sensitive.

To complete these instructions, you will need your User ID and Password.

**NOTE:** Direct Connect will require registration. This registration can be completed in Online Banking. Under the **Additional Services** menu, choose **Connectivity for Quicken® and QuickBooks®** to create Direct Connect password.

It's important to perform these steps as described and in the order presented to ensure your Quicken connectivity continues to function properly. This process should take approximately 15–30 minutes.

## Documentation and Procedures

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**Task 1:** Prepare for conversion before **January 24, 2018**.

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1. Back up your data file. For instructions, choose **Help** menu > **Quicken Help**. Search for **Backup Data File** and follow the instructions.
  2. Download the latest Quicken Update. For instructions, choose **Help** menu > **Quicken Help**. Search for **Update Software** and follow the instructions.
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**Task 2:** Connect to **Delta Community Credit Union** for a final download before **January 24, 2018**.

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1. Choose **Tools** menu > **One Step Update**.

2. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.
3. In the **One Step Update Settings** dialog, make sure all items are checked and click **Update Now**.
4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

**NOTE:** If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

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**Task 3:** Disconnect accounts at **Delta Community Credit Union** on or before **January 24, 2018**.

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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**. 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.

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**Task 4:** Reconnect accounts to **Delta Community Credit Union** on or after **January 24, 2018**.

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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 **Delta Community Credit Union** 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 Direct Connect Username and Password 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**.

*You're all set! Thank you for being a valued member of Delta Community.*