

Quicken Conversion Instructions

Introduction

As Georgia United Credit Union prepares to upgrade your Online & Mobile Banking experience, 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.

Thank you for making these important changes!

IMPORTANT: Express Web Connect will not be available until **October 25, 2022**, so please utilize another connectivity type if you need transaction updates during this downtime. There is no delay for Web Connect.

To navigate this document, just click the link below that matches your product and connectivity:

Instructions for One-Step Update initiated from within Quicken

[Quicken Windows Express Web Connect](#) - Page 2

[Quicken Mac Quicken Connect](#) - Page 3

Instructions for Downloading a Web Connect file from your Online Banking Site

[Quicken Windows Web Connect](#) - Page 4

[Quicken Mac Web Connect](#) - Page 5

Quicken for Windows

Express Web Connect

Documentation and Procedures

Task 1: Conversion Preparation - On **October 14, 2022**

1. Back up your Quicken Windows Data File. Go to **File > Backup and Restore > Backup Quicken File**.
 2. Download the latest Quicken Update. Go to **Help > Check for Updates**.
 3. Complete a final transaction download. Accept all new transactions into the appropriate registers.
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Task 2: Disconnect accounts connected to **Georgia United Credit Union** on **October 18, 2022**

1. Choose **Tools > Account List**.
 2. Click **Edit** on the account to deactivate.
 3. In Account Details, click **Online Services**.
 4. Click **Deactivate**. Follow prompts to confirm deactivation.
 5. Click the **General** tab.
 6. Delete Financial Institution and Account Number information. Click **OK** to close window.
 7. Repeat steps for any additional accounts that apply.
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Task 3: Reconnect accounts connected to **Georgia United Credit Union** on **October 18, 2022**

1. Choose **Tools > Account List**.
2. Click **Edit** on the account you want to activate.
3. In Account Details, click **Online Services** and then choose **Set up Now**.
4. Type Georgia United Credit Union in the search field and click Next.
5. Enter your financial institution credentials.
 - a. Express Web Connect uses the same credentials you use for your institution's online banking login.

Important: If your credentials do not work, contact Georgia United Credit Union.

6. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu.

Important: Do NOT choose "Create a new account" unless you intend 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 or click Cancel.

7. After all accounts have been matched, click **Next** and then **Done**.

Quicken for Mac

Quicken Connect

Documentation and Procedures

Task 1: Conversion Preparation - On **October 14, 2022**

1. Backup 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 your transaction history up to date.
 - b. Accept all new transactions into the appropriate registers.
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Task 2: Activate accounts connected to **Georgia United Credit Union** on **October 18, 2022**

1. Click your account in the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter **Georgia United Credit Union** in the search field, select the correct option and click **Continue**.
5. Enter your financial institution credentials.
 - a. Express Web Connect uses the same credentials you use for your institution's online banking login.

Important: If your credentials do not work, contact Georgia United Credit Union.

6. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under **Action**, choose **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.

7. Click **Finish**.

Quicken for Windows

Web Connect

Documentation and Procedures

Task 1: Conversion Preparation - On October 14, 2022

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 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.
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Task 2: Deactivate accounts connected to Georgia United Credit Union on October 18, 2022

1. Choose **Tools > Account List**.
 2. Click **Edit** on the account to deactivate.
 3. In Account Details, click **Online Services**.
 4. Click **Deactivate**. Follow prompts to confirm deactivation.
 5. Click the **General** tab.
 6. Delete Financial Institution and Account Number information.
 7. Click **OK** to close window.
 8. Repeat steps for any additional accounts.
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Task 3: Reactivate accounts connected to Georgia United Credit Union on October 18, 2022

1. Download a Quicken Web Connect file from Georgia United Credit Union's online banking site.
2. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
3. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
4. 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.
5. Repeat this step for each account you have connected to Georgia United Credit Union.

Quicken for Mac

Web Connect

Documentation and Procedures

Task 1: Conversion Preparation - On **October 14, 2022**

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 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.

Task 2: Activate accounts connected to **Georgia United Credit Union** on **October 18, 2022**

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 Georgia United Credit Union in the search field, select the correct option and click **Continue**.
5. Log into Georgia United Credit Union's 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 **Drop 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**.