



Quicken for Mac 2015-2017 Conversion Instructions

Direct Connect

Introduction

As **OnPoint Community Credit Union** completes its Business Online Banking 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 online banking User ID and Password.

NOTE: Direct Connect may require registration. Please contact OnPoint 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!

Documentation and Procedures

Task 1: Conversion Preparation

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.

Task 2: Disconnect Accounts at **OnPoint Community CU - Direct** after **enrolling in OnPoint Business Online Banking**

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.

Task 3: Reconnect Accounts to **OnPoint Community CU - New** after **enrolling in OnPoint Business Online Banking**

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 **OnPoint Community CU - New** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
5. Enter your Direct Connect **User Id** and **Password** and click **Continue**.
6. If OnPoint 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**.