

# Quicken for Mac 2015-2017 Conversion Instructions

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## *Express Web 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:** **Quicken Express Web Connect** uses the same User ID and Password as OnPoint online banking.

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

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#### **Task 1:** Conversion Preparation

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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.

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

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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.

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

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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 – WC** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Enter your **User ID** and **Password** and click **Continue**.
6. If OnPoint requires extra information, enter it to continue.

**NOTE:** Select “Express Web Connect” or “Quicken 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.

8. Select **Finish**.