Quicken for Mac 2015-2017 Conversion Instructions

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.

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: Connect Accounts at *OnPoint Community CU – WC* 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 – WC* in the **Search** field, select the name in the **Results** list and click **Continue**.

5. Log in to *OnPoint Business Online Banking.* **Download** a file of your transactions to your computer.

    a. Click on an account title

    b. Click the ⬇ Icon

    c. Choose Quicken

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.