

Quicken for Windows System Upgrade Instructions

Web Connect



Introduction

As Affinity Credit Union completes its system upgrade, you will need to modify your Quicken settings to ensure the smooth transition of your data.

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

Documentation and Procedures

Task 1: System Upgrade Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up Your Data** and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Update Software** and follow the instructions.

Task 2: Connect to *Affinity Credit Union* for a final download before **Noon Central on 2/28/2018**

1. Download your Quicken Web Connect file from <https://www.affinitycuia.org/>
2. Click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.
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.

Task 3: Disconnect Accounts at *Affinity Credit Union* on or after **3/2/2018**

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.

3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **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 to be disconnected.

Task 4: Reconnect Accounts to *Affinity Credit Union* on or after 3/2/2018

1. Download your Quicken Web Connect file from <https://www.affinitycuia.org/>

NOTE: Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

2. Click **File > File Import > Web Connect File**. Locate and select the Web Connect file to import.
3. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

IMPORTANT:

Do **NOT** select **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, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.

4. Repeat steps for each account to be reconnected.