

Quicken for Windows Conversion Instructions



Direct Connect to Web Connect

Introduction

As Mid Oregon Federal Credit Union completes its system conversion 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.

To complete these instructions, you will need your login credentials for Direct Connect and/or online banking.

NOTE: Direct Connect may require registration. Please contact *your financial institution* to verify your Direct Connect login information. Web Connect uses the same User ID and Password as the [Financial Institution B] website.

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 > Quicken Help. Search for *Backup Data File* and follow the instructions.
2. **Download the latest Quicken Update.** For instructions to download an update, choose Help menu > Quicken Help. Search for *Update Software* and follow the instructions.

Task 2: **Optional task** - Complete a final download before *04/10/2020*

1. **Choose Tools menu > One Step Update.**
2. **Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.**
3. **In the One Step Update Settings dialog, make sure all items are checked and click Update Now.**
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 in Quicken on or after *04/10/2020*

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 on Deactivate or Deactivate Online Payment (only available if you use bill pay services). 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 Mid Oregon Federal Credit Union NEW on or after 04/14/2020

1. Download your Quicken Web Connect file from <https://www.midoregon.com/index.shtml>

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 Cancel.

4. Repeat steps for each account to be reconnected.