

Quicken for Windows Conversion Instructions



Quicken for Windows 2013–2015

Web Connect

Introduction

As Palmetto Health Credit Union completes its system conversion to a new online banking product, 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 online banking username and password.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

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 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: Deactivate Your Account(s) At Palmetto Health Credit Union on or after June 22, 2015

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 2–6 for each account at Palmetto Health Credit Union.

Task 3: Re-activate Your Account(s) at Palmetto Health Credit Union on or after June 22, 2015

1. Log in to your online banking with Palmetto Health Credit Union download your Quicken Web Connect file.
2. Click **File > File Import > Web Connect File**.
3. If prompted for connectivity type, select **Web Connect**.

IMPORTANT: 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.

4. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching account in the drop-down menu.

IMPORTANT: Do **NOT** select **Create a new account**. 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.

5. Repeat steps 2 – 4 for all of your accounts.

Thank you for making these important changes!