Quicken for Windows Conversion Instructions

Direct Connect to Web Connect

Introduction

As ***Sandia Laboratory 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 User ID and Password for each Financial Institution.

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!

This detour symbol indicates instructions in a Task specifically for **Bill Pay within Quicken**. If you do **not** use Quicken to make online bill payments, skip that Task.

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: Cancel Outstanding Payments before ******11 am on 3/12/2018******

If you are **not** a Bill Pay user within Quicken, skip this Task.

IMPORTANT:	This Task must be completed to avoid possible duplicate payment. If you do not cancel payments scheduled to be paid on or after ******3/12/2018****** these payments may still be processed.

1. Choose **Tools** menu > **Online Center**.

2. Select ***Sandia Laboratory FCU-New*** from the **Financial Institution** drop-down list.

3. On the **Payments** tab, select an account from which a payment is scheduled in the future.

NOTE:	Click **Print** to save your list of pending payments. You can use this when you recreate and send these payments later.

4. In the payment status list, you will cancel payments for each payee with a status that is scheduled for delivery on a date after ******3/12/2018****** To do this, select the first payee and click **Cancel Payment**.

5. Perform steps 3 & 4 for all payments scheduled for delivery on a date after ******3/12/2018******

6. On the toolbar, choose **Repeating**.

7. Select a payment instruction and click **Delete**. You will need to click **Delete** again in a confirmation window.

8. Repeat step 7 for each repeating payment instruction you have with your financial institution.

Task 3: Disconnect Accounts at ***Sandia Laboratory FCU - New*** on or after ***3/13/2018***

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 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 ***Sandia Laboratory FCU*** on or after ***3/20/2018***

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1. Download your Quicken Web Connect file from https://www.slfcu.org/***.***
   Before downloading the transactions from each SLFCU account, be sure to limit the date range to the transactions that occurred since your last download. To select a date range in the Accounts display, click the funnel icon to the right of the Search by Description field that is displayed just above the transactions. Next, click in the Date field and select Date Range, set the start and end dates of transactions to be downloaded and then click Search. After you click the Search button, click the download icon and select your export format. The resulting download will be limited to the date range that you previously selected.

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.