

# Quicken for Mac Conversion Instructions

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*Quicken for Mac 2015*

*Web Connect to Direct Connect*

## Introduction

As **Central Credit Union of Florida** 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 **eBranch Login User Name and Password** for the Central Credit Union of Florida website.

**NOTE:** Direct Connect may require registration. Please contact **Central Credit Union of FL** to verify your Direct Connect login information.

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

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### Task 1: Conversion Preparation

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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.

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### Task 2: Deactivate Your Account(s) At **Central Credit Union of Florida** on or after **March 31, 2016**.

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1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select Troubleshooting > Deactivate Downloads.
4. Repeat steps for each account at **Central Credit Union of Florida**.

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### Task 3: Re-activate Your Account(s) at **Central Credit Union of FL** on or after March 31, 2016

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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 **Central Credit Union of FI** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
5. Enter your Direct Connect **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

**NOTE:** Select "Direct Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, 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. Select **Finish**.

*Thank you for making these important changes!*