



Quicken for Mac Conversion Instructions

Direct Connect

Introduction

As **HFS 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.

NOTE: Direct Connect may require registration. Please contact **your financial institution** to verify your Direct Connect login information.

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 > **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.

Task 2: Disconnect Accounts in Quicken on or after **06/01/2020**

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 to be disconnected.

Task 3: Reconnect Accounts to **HFS Federal Credit Union** on or after **06/01/2020**

5. Select your account under the Accounts list on the left side.
6. Choose **Accounts** menu > **Settings**.
7. Select **Set up transaction download**.
8. Enter **HFS Federal Credit Union** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
9. Enter your Direct Connect **User Id** and **Password** and click **Continue**.
10. If the bank requires extra information, enter it to continue.

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

11. 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.

12. Select **Finish**.
13. If you need help creating your payments, click on **Help** in the top menu.
14. Search for "**Adding online Bill Pay transactions**" and click that item.
15. Follow the instructions to enter or transmit an online payment.