



Quicken for Mac 2007 Conversion Instructions

Direct Connect

Please note, Direct Connect is not subject to the scheduled upgrade downtime and can be reconnected on January 24th

Introduction

As **Delta Community Credit Union** completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. We have provided detailed steps to help you with this process. Please reference the dates listed for each task, as this information is time sensitive.

To complete these instructions, you will need your User ID and Password for **Delta Community Credit Union**.

NOTE: Direct Connect will require registration. This registration can be completed in Online Banking. Under the **Additional Services** menu, choose **Connectivity for Quicken® and QuickBooks®** to create Direct Connect password.

It's important to perform these steps as described and in the order presented to ensure your Quicken connectivity continues to function properly. This process should take approximately 15–30 minutes.

Documentation and Procedures

Task 1: Prepare for conversion before January 24, 2018.

1. Back up your data file. For instructions, 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, choose **Help** menu > **Search**. Search for **Updates**, select **Check for Updates** and follow the instructions.
-

Task 2: Connect to **Delta Community Credit Union** for a final download before January 24, 2018.

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.

3. Repeat this step for each account (such as checking, savings, credit cards and brokerage) that you use for online banking or investing.

Task 3: Disconnect accounts at **Delta Community Credit Union** on or after **January 24, 2018**.

1. Choose **Lists** menu > **Accounts**.
2. Select the account that you want to disable and click **Edit**.
3. Write down your account information (account number, routing number and customer ID).

NOTE: You will need this information to re-enable your account.

4. If you use online payment services, then select **Not Enabled** in the **Pay Bills Online** drop-down list. Follow the prompts to confirm the deactivation.
5. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
6. Remove the information within the **Account Number** and **Routing Number** fields.
7. Click **OK** to save your edits.
8. Repeat steps for each account to be disconnected.
9. Verify your account list does not display a blue online circle icon for any accounts at **Delta Community Credit Union**.

Task 4: Reconnect accounts to **Delta Community Credit Union** on or after **January 24, 2018**.

1. Choose **Lists** menu > **Accounts**.
2. Select your first disabled account and click **Edit**.
3. Click the **Financial Institution** drop-down list and select **Change Financial Institution**.
4. Click on **Update List**.
5. In the **Financial Institutions** dialog, enter, then select **Delta Community Credit Union** from the list and click **Use**.
6. Enter your Direct Connect **Username** and **Password**. Click **OK**.
7. In the **Add Online Services** dialog, match your first account to the appropriate account number. Click **OK**.

NOTE: Each account will be displayed below **Use an existing account**.

8. Click **OK**.
9. Click **OK** to close the **Edit Register** page.

10. Choose **Lists** menu > **Accounts**. Verify that each account you are reactivating has a blue online circle for online services.

You're all set! Thank you for being a valued member of Delta Community.