



Quicken for Windows Conversion Instructions

Express Web Connect

Introduction

As **Yolo Federal Credit Union** 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 Member # and Password for Yolo Federal Credit Union.

NOTE: **Express Web Connect** uses the same Member # and Password as Yolo Federal Credit Union.

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 > **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: Disconnect Accounts at *Yolo Federal Credit Union* on or after *May 15, 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 **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 for each account to be disconnected.

Task 3: Reconnect Accounts to *Yolo Federal Credit Union* on or after *May 21, 2018*

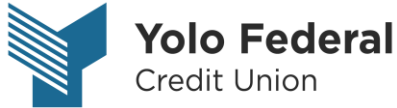
1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to activate.
3. In the **Account Details** dialog, click the **Online Services** tab.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter *Yolo Federal Credit Union* in the search field, select the name in the list and click **Next**.
7. If presented with the Select Connection Method screen, select **Express Web Connect**.
8. Enter your **Member #** and **Password**. Click **Connect**.

NOTE: You may be presented with a security question from Yolo Federal Credit Union prior to receiving your accounts.

9. 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 accounts in the drop-down menu.

IMPORTANT: Do **NOT** select **Add to Quicken** 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**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
11. Click **Done** or **Finish**.



Quicken for Mac 2015-2017 Conversion Instructions

Express Web Connect

Introduction

As **Yolo 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 Member # and Password for Yolo Federal Credit Union.

NOTE: **Quicken Express Web Connect** uses the same Member # and Password as Yolo Federal Credit Union.

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 4: Conversion Preparation

12. 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.
13. 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 5: Disconnect Accounts at *Yolo Federal Credit Union* on or after *May 15, 2018*

14. Select your account under the **Accounts** list on the left side.
15. Choose **Accounts** menu > **Settings**.
16. Select **Troubleshooting** > **Deactivate Downloads**.
17. Repeat steps for each account to be disconnected.

Task 6: Reconnect Accounts to *Yolo Federal Credit Union* on or after *May 21, 2018*

18. Select your account under the **Accounts** list on the left side.
19. Choose **Accounts** menu > **Settings**.
20. Select **Set up transaction download**.
21. Enter **Yolo Federal Credit Union** in the **Search** field, select the name in the **Results** list and click **Continue**.
22. Enter your **Member #** and **Password** and click **Continue**.
23. If the bank requires extra information, enter it to continue.

NOTE: Select “Express Web Connect” or “Quicken Connect” for the “Connection Type” if prompted.

24. In the “**Accounts Found**” screen, ensure you 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.

25. Select **Finish**.