

Quicken for Windows Conversion Instructions

Direct Connect to 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: **Direct Connect** may require registration. Please contact your financial institution to verify your Direct Connect login information. **Express Web Connect** uses the same User ID and Password as the **Yolo Federal Credit Union-New**.

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.
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Task 2: Cancel Outstanding Payments before **May 15, 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 **May 15, 2018**, these payments may still be processed.

1. Choose **Tools** menu > **Online Center**.
2. Select **Yolo Federal Credit Union** 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 schedule for delivery on a date on or after **May 15, 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 on or after **May 15, 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 Yolo Federal Credit Union.
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Task 3: 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 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 *Yolo Federal Credit Union* on or after *May 21, 2018*

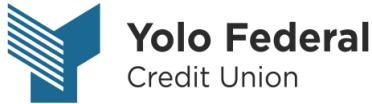
1. Choose **Tools** menu > **Account List**.
2. Click the Edit button of the account you want to activate.
3. In the **Account Details** dialog, click the **Online Services** tab.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter *Yolo Federal Credit Union-New* in 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 your Financial Institutions 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

Direct Connect to 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: **Direct Connect** may require registration. Please contact your financial institution to verify your Direct Connect login information. **Express Web Connect** uses the same User ID and Password as the **Yolo Federal Credit Union-New**.

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 (Not available in Quicken for Mac 2015)**. If you do **not** use Quicken to make bill payments, skip that Task.

Documentation and Procedures

Task 5: 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 6: Cancel Outstanding Payments before **May 15, 2018** (**Not available in Mac 2015**)



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 **May 15, 2018**, these payments may still be processed.

1. Highlight a Bill Payment transaction on the account register.

NOTE: While on the account register, go to **File > Print** to save your list of pending payments. You can use this when you recreate and send these payments later.

2. Click on the **Edit** button located on the action bar at the bottom of the account register window.
3. Click on the **Edit Details** tab located below the highlighted transaction.
4. Click on the **Online Payment** tab.
5. Click on **Cancel Payment**.
6. Repeat steps for each outstanding payment transaction you have with your financial institution.

Task 7: Disconnect Accounts At **Yolo Federal Credit Union** on or after **May 15, 2018**

7. Select your account under the **Accounts** list on the left side.
8. Choose **Accounts** menu > **Settings**.
9. Select **Troubleshooting > Deactivate Downloads**.
10. Repeat steps for each account to be disconnected.

Task 8: Reconnect Accounts to **Yolo Federal Credit Union-New** on or after **May 21, 2018**

11. Select your account under the **Accounts** list on the left side.
12. Choose **Accounts** menu > **Settings**.
13. Select **Set up transaction download**.
14. Enter *Yolo Federal Credit Union-New* in the **Search** field, select the name in the **Results** list and click **Continue**.
15. Enter your **Member #** and **Password** and click **Continue**.
16. If the bank requires extra information, enter it to continue.

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

17. 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.

18. Select **Finish**.