



# Quicken for Mac 2007 Conversion Instructions

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## *Direct Connect*

### Introduction

As GFA 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 GFA User ID and Password.

**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

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#### **Task 1:** Conversion Preparation

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1. Back up 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:** Disconnect Accounts at **GFA Federal Credit Union** on or after **June 4, 2018**

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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 **GFA Federal Credit Union**.

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**Task 3:** Reconnect Accounts to **GFA Federal Credit Union – New** on or after **June 4, 2018**

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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 **GFA Federal Credit Union - New** from the list and click **Use**.
6. Enter your Direct Connect **User ID** 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.