Quicken for Mac
Conversion Instructions

Web Connect to Direct Connect

Introduction

As **Redstone 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 online banking and/or Direct Connect.

NOTE:	Use your Redstone business online banking credentials to log in. **Please note, your username will be a combination of your Redstone customer ID and user ID without any spaces.** Your password will be the same as your business online banking password.

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

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1. Backup your data file. Go to **File** > **Save a Backup**

2. Download the latest Quicken Update. Go to **Quicken** > **Check for Updates**

Task 2: Connect Accounts to **Redstone Federal Credit Union-BB** on or after *March 3rd, 2020*

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1. Select your account in the **Accounts** list on the left sidebar.

2. Choose **Accounts** menu > **Settings**.

3. Select **Set up transaction download.**

4. Enter **Redstone Federal Credit Union** in the **Search** field, select **Redstone Federal Credit Union-BB** and click next.

5. Enter your Direct Connect **User Id** (a combination of your Redstone business online banking Customer ID and User ID without any spaces) and **Password** and click **Continue**.

6. If the bank requires extra information, enter it to continue.

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

7. In the "**Accounts Found**" screen, associate each new account to accounts in your Quicken data file. Under the **Action** column, select "**Link"** to pick your existing account. When complete, click Finish.

> **IMPORTANT:** Do **NOT** select "**ADD**" under the action column unless you intend to add a new account to Quicken.