

Quicken for Windows 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

1. Backup your data file. Go to **File > Backup and Restore > Backup Quicken File**.

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

Task 2: Disconnect Accounts in Quicken on or after **March 3rd, 2020**

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 **Redstone Federal Credit Union-BB** on or after **March 3rd, 2020**

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 on the Online Services tab.
4. Click Set up Now.
5. Use Advanced Setup to activate your account.
6. Enter **Redstone Federal Credit Union** in the search field, select **Redstone Federal Credit Union-BB** and click **next**.
7. If presented with the Select Connection Method screen, select **Direct Connect**.
8. Type 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 **Connect**.
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 want 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**.