Quicken for Windows Conversion Instructions

Direct Connect to Web Connect

Introduction

As Nuvision Credit Union completes its system conversion to the new online banking system**,** 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 Direct Connect and/or online banking.

NOTE: **Direct Connect** may require registration. Please contact Nuvision Credit Union to verify your Direct Connect login information. **Web Connect** uses the same User ID and Password as our website.

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. Go to **File** > **Backup and Restore** > **Backup Quicken File**.
2. Download the latest Quicken Update. Go to **Help** > **Check for Updates**

Task 2: ***Optional task*** – Complete a final download **before** November 18, 2019

1. Choose **Tools** menu > **One Step Update**.
2. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.
3. In the **One Step Update Settings** dialog, make sure all items are checked and click **Update Now**.
4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

NOTE: If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

Task 3: Cancel Outstanding Payments **before** November 18, 2019.

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 November 18, 2019, these payments may still be processed.

1. Choose **Tools** menu > **Online Center**.
2. Select **Nuvision 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 after November 18, 2019. 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 after November 18, 2019.

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 your financial institution.

Task 4: Disconnect Accounts in Quicken on or after November 18, 2019.

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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 5: Reconnect accounts to ***https://nuvisionfederal.com*** on or after November 18, 2019.

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1. Download your Quicken Web Connect file from *https://nuvisionfederal.com*.

> **NOTE:** Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

2. Click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.

3. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

IMPORTANT: Do **NOT** select **Create a new account** 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** or click **Cancel**.

4. Repeat steps for each account to be reconnected.