Quicken for Mac 2007 Conversion Instructions

Web Connect

Introduction

As ***Bethpage Federal Credit Union*** completes its system conversion to ***a new Online and Mobile Banking Experience,*** you will need to modify your Quicken settings to ensure the smooth transition of your data.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

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. For instructions to back up your data file, choose **Help** menu > **Search**. Search for *Backing Up*, select "**Backing Up Your Data**," and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for *Updates*, select "**Checking for Updates to Quicken**," and follow the instructions.

Task 2: Disconnect Accounts at *Bethpage Federal Credit Union* on or after *you upgrade.*

1. Choose **Lists** menu > **Accounts**.

2. Select the account to deactivate and click **Edit**.

3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.

4. Remove the information within the **Account Number** and **Routing Number** fields.

5. Click **OK** to save your edits.

6. Repeat steps 2 – 5 for each account to be disconnected.

7. Verify your account list does not display a blue online circle icon for the accounts you are disconnecting.

Task 3: Connect Accounts at *Bethpage Federal Credit Union - NY* on or after *you upgrade.*

1. To download your Quicken Web Connect file, log into Online Banking by first visiting *www.lovebethpage.com*

2. Enter your credentials in the **Online Banking Member Login** area.

3. From your Online Banking dashboard, click on a specific account to view more details.

4. Click on the "Export Transactions" button located on the right portion of the details screen. (screenshot below)
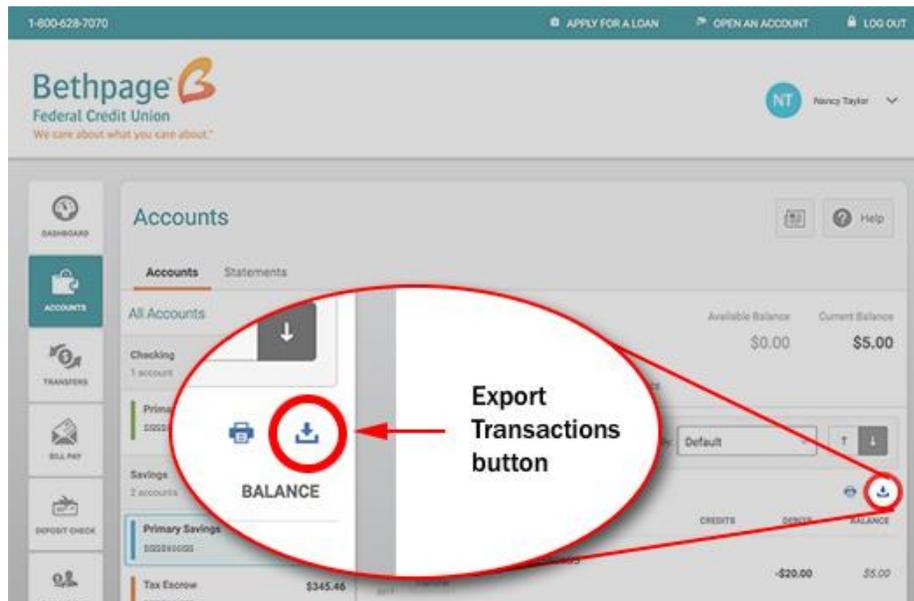
5. When prompted to choose an Export option, choose "Quicken 2003 or newer" in the dropdown. (screenshot below)
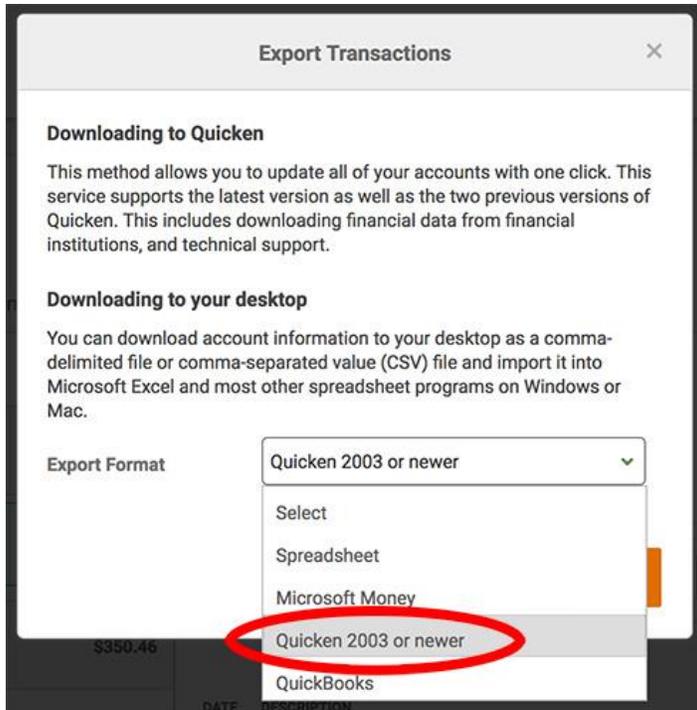
6. Save the file to your computer.

> 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.

7. In Quicken, click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.

8. Associate the account to the appropriate account already listed in Quicken. Select **Use an existing account**.

9. Match the transactions you are importing to the corresponding existing Quicken account in the drop-down list and click **OK**.

10. Repeat steps for each account to be reconnected.

11. Choose **Lists** menu > Accounts. Verify each account at *Bethpage Federal Credit Union - NY* has a blue online circle indicating it has been reactivated for online services.