



Quicken for Mac Conversion Instructions

Express Web Connect

Introduction

As **Bossier Federal Credit Union** completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data.

To complete these instructions, you will need your login credentials for online banking.

NOTE **Quicken Express Web Connect** uses the same User ID and Password as your financial institution's 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!

Documentation and Procedures

1. Conversion Preparation

1. Backup your data file. Go to **File > Save a Backup**
2. Download the latest Quicken Update. Go to **Quicken > Check for Updates**

2. Disconnect Accounts in Quicken

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Troubleshooting > Deactivate Downloads**.
4. Repeat steps for each account to be disconnected.

3. Reconnect Accounts to **Bossier FCU-Web**

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download**.
4. Enter **Bossier FCU-Web** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Enter your **User ID** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

NOTE Select "Express Web Connect" or "Quicken Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select "**Link**" to pick your existing account.

IMPO Do **NOT** select "**ADD**" under the action column.

8. Select **Finish**.