



Quicken for Mac Conversion Instructions

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.

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. Connect Accounts at **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. Log in to <https://www.bossierfcu.org/> . **Download** a file of your transactions to your computer:

NOTE Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

6. Drag and drop the downloaded file into the box **Drop download file**.

NOTE Select "Web 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 unless you intend to add a new account to Quicken.

8. Click **Finish**.
9. Repeat steps for each account to be connected.