



# Quicken for Windows Conversion Instructions

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*Web Connect to Direct Connect*

## Introduction

As **Community Bank & Trust** completes its system conversion to **MIDFLORIDA Credit Union**, 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:** **Web Connect** uses the same User ID and Password as the **Community Bank & Trust** website. **Direct Connect** may require registration. Please contact **MIDFLORIDA Credit Union** to verify your Direct Connect login information.

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

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**Task 1:** Conversion Preparation

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1. Back up your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **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 **Update Software** and follow the instructions.

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**Task 2: *Optional task*** – Complete a final download before **04/03/2020 10pm EDT**

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1. Download your Quicken Web Connect file from **www.cbtfi.com**.
2. Click **File > File Import > Web Connect File**. Locate and select the Web Connect file to import.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.
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.

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**Task 3:** Disconnect Accounts in Quicken on or after **04/03/2020**

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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 **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.

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**Task 4:** Reconnect Accounts to **MIDFLORIDA Premier OB** on or after **04/06/2020**

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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 **MIDFLORIDA Premier OB** in the search field, select the name in the list and click Next.
7. If presented with the Select Connection Method screen, select **Direct Connect**.
8. Type your Direct Connect **User ID** 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**.