

Quicken for Windows Conversion Instructions



Express Web Connect

Introduction

As **The Tennessee Credit Union** completes its system conversion, 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.

NOTE: **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

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Quicken Help**. Search for **Backup Data File** and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Quicken Help**. Search for **Update Software** and follow the instructions.

Task 2: **Optional task** - Complete a final download **before 09/20/2019**

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: Disconnect Accounts in Quicken on or after **09/20/2019**

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.

Task 4: Reconnect Accounts to *The Tennessee Credit Union* on or after **09/30/2019**

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 the **Online Services** tab.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter *The Tennessee Credit Union* in the search field, select the name in the list and click **Next**.
7. If presented with the Select Connection Method screen, select **Express Web Connect**.
8. Enter your **User ID** and **Password**. Click **Connect**.

NOTE: You may be presented with a security question from your Financial Institutions prior to receiving your accounts.

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 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**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
11. Click **Done** or **Finish**.

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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

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 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.

Task 2: ***Optional task*** - Complete a final download **before 09/20/2019**

1. Download your Quicken Web Connect file from <https://www.ttcu.org/>.
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.

Task 3: Disconnect Accounts in Quicken on or after **09/20/2019**

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.

Task 4: Reconnect Accounts to **The Tennessee Credit Union** on or after **09/23/2019**

1. Download your Quicken Web Connect file from <https://www.ttcu.org/>.

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.

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 the **Cancel** button.

4. Repeat steps for each account to be reconnected.

Quicken for Mac Conversion Instructions



Web Connect

Introduction

As **The Tennessee Credit Union** completes its system conversion, 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.

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 data files**, and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates**, select “Check for Updates,” and follow the instructions.

Task 2: *Optional task* - Complete a final download **before 09/20/2019**

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Sign in to online banking and download transactions for an account.
4. Import the transactions.
5. Repeat steps for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Connect Accounts at **The Tennessee Credit Union** on or after **09/23/2019**

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 <https://www.ttcu.org/> in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Log in to <https://www.ttcu.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.

IMPORTANT: 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.

Quicken for Mac Conversion Instructions



Express Web Connect

Introduction

As **The Tennessee Credit Union** completes its system conversion, 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.

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

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

Task 2: *Optional task* - Complete a final download **before 09/20/2019**

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) you use for online banking or investing.

Task 3: Disconnect Accounts in Quicken on or after **09/20/2019**

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.

Task 4: Reconnect Accounts to **The Tennessee Credit Union** on or after **09/30/2019**

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 **The Tennessee Credit Union** 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.

IMPORTANT: Do **NOT** select "**ADD**" under the action column.

8. Select **Finish**.

QuickBooks Online Conversion Instructions



Small Business / Freelancer / Advanced

Introduction

As **The Tennessee Credit Union** completes its system conversion, QuickBooks Online settings will need to be updated to ensure transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, use your **login credentials** for online banking.

It is important that you perform the following instructions exactly as described and in the order presented. This conversion should take 15–30 minutes.

Documentation and Procedures

Conversion – Information only

QuickBooks Online data is stored on Intuit servers in the cloud. Since we update your records with every change, we cannot restore your file to a previous point in time.

QuickBooks Online automatically updates your selected version so you are always on the latest release.

IMPORTANT: QuickBooks Online connectivity services may be interrupted up to 5 business days after the conversion is complete.

Task 1: *Optional task* - Complete a final download **before 09/20/2019**

NOTE: Please skip to **Page 3** if you **Manually Import Transactions**.

1. Sign in to QuickBooks Online
2. Click **Banking**.
3. In the top-right area, click **Update**.
4. After your download finishes, click the **For Review** tab to confirm items downloaded.

Task 2: Match Downloaded Transactions

1. Accept all new transactions on the **Banking** page. Simply check off all the New/Matched transactions and click **Batch Action** to "**Accept Selected**".
2. Assistance on matching transactions is available in the **Help menu** > Search for **Matching Transactions** and follow the instructions in the appropriate article.

Task 3: Deactivate Accounts in QuickBooks Online on or after **09/20/2019**

1. Select **Banking** on the left column.
2. Click on the account you would like to disconnect, then click the **Pencil Icon**.
3. Click on **Edit Account Info**.
4. Check the box next to **Disconnect this account on save**.
5. Click **Save and Close**.
6. Repeat steps 2-6 to deactivate additional accounts.

Task 4: Reconnect Accounts at *The Tennessee Credit Union* on or after **09/30/2019**

1. In the upper-right area, click **Add Account**
2. Enter *The Tennessee Credit Union*
3. Click *The Tennessee Credit Union* in the search results below.
4. Type your **login credentials**. Click **Continue**.
5. Provide any additional information requested, to proceed.
6. Ensure you associate the account for **Financial Institution B** to the appropriate account already listed under **Which accounts do you want to connect?** Select the matching accounts in the drop-down menu.

IMPORTANT: Do **NOT** select **+Add new**. If you are presented with accounts you do not want to track in this data file, **Uncheck** the box next to the **Account name**.

7. After all accounts have been matched, click **Connect**.
8. When the download is finished, you will return to the **Banking** page.

Task 5: Excluding Duplicate Transactions

1. Choose **Banking**.
2. In the **For Review** section, click the checkboxes for the transactions you want to exclude.
3. Click **Batch Actions > Exclude Selected**.

NOTE: If you accidentally exclude a transaction, you can include it again.

Task 6: Undo Excluded Transactions

1. Choose **Banking**.
2. Click the **Excluded** tab.
3. Click the checkboxes for the transactions you want to include.
4. Click **Batch Actions > Undo**.
5. Transactions will appear again in the **New Transactions** tab for you to work with.

Additional Instructions: Need to Manually Import Transactions?

1. Log in to <https://www.ttcu.org/>.
2. Download one of the following Web Connect file types.
 - a. .qbo (QuickBooks)
 - b. .qfx (Quicken)
3. In **QuickBooks Online**, choose **Banking**.
4. In the upper-right corner, click **File Upload**.
5. Click Browse and select the Web Connect file from your computer. Click **Next**.
6. Select the appropriate account from the drop-down menu. Click **Next**.
7. When the import is completed, click **Let's go!**
8. After your download finishes, click the **For Review** tab to see what was downloaded.

Thank you for making these important changes!

Mint

Conversion Information



[Mint.com](https://mint.com)

Introduction

As **The Tennessee Credit Union** completes its system conversion, Mint aggregation services may be interrupted for up to 5 business days.

NOTE: You will be able to access online banking information by directly logging into your financial institution website during the interrupted time.

Mint Conversion Information

Mint.com data is stored on Intuit cloud servers. Data is updated with every change and cannot restore data to a previous point in time.

For a successful account update, do not login into Mint.com for **The Tennessee Credit Union** until 5 business days after **09/23/2019**.

During this time, the Mint.com server will automatically make the system conversion for your activated accounts. If you login into Mint.com during this time, you may see duplicate accounts or an error displayed. Please do not attempt to change the status or make any changes in Mint.com during this time. After 5 business days, the accounts should reconcile showing your transaction history available.

In the event that your accounts do not display current transactions after 5 business days, you may log back into Mint.com and click refresh  to update the account. After the download completes, click the Transactions tab to view up to 90 days of transaction history.

Thank you for your patience during these changes!