

Quicken Conversion Instructions

As Centra Credit Union completes our upgrade to digital banking, you'll need to modify your Quicken settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for both Windows and Mac, and all three connectivity types (Direct Connect, Express Web Connect or Web Connect).

IMPORTANT: Express Web Connect will not be available until five business days after July 19, 2022, so please utilize another connectivity type if you need transaction updates during this downtime. There is no delay for Web Connect or Direct Connect (if supported).

To navigate this document, just click the link or links below that match your product and connectivity:

Instructions for One-Step Update initiated from within Quicken

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Instructions for Downloading a Web Connect file from your Online Banking Site

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IMPORTANT: If you currently use Direct Connect in Quicken to initiate Bill Payments, please complete the additional tasks at the link below. If you do not use Direct Connect Bill Pay or you only initiate Bill Payments from within your Online Banking, these additional tasks are not required.

Quicken Windows Direct Connect and Express Web Connect

Before 6pm ET on July 18, 2022:

1. Back up your Quicken Windows Data File. Go to **File > Backup and Restore > Backup Quicken File**.
2. Download the latest Quicken Update. Go to **Help > Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

After 8am ET on July 19, 2022:

1. Deactivate your Centra Credit Union accounts.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Centra Credit Union and Account Number information. Click **OK** to close window.
 - g. Repeat steps for any additional accounts that apply.
2. Reconnect the online banking connection for your accounts.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account you want to activate.
 - c. In Account Details, click **Online Services** and then choose **Set up Now**.
 - d. Type Centra Credit Union in the search field and click Next.
 - e. Enter Centra's credentials.
 - Express Web Connect uses the same credentials you use for Centra's digital banking login.
 - Direct Connect might require credentials that do not match your digital banking credentials.

Important: If your credentials do not work, contact Centra Credit Union.

- f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu.

Important: Do NOT choose "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, choose **Ignore – Don't Download into Quicken** or click **Cancel**.

- g. After all accounts have been matched, click **Next** and then **Done**.

Quicken Mac Direct Connect and Quicken Connect

Before 6pm ET on July 18, 2022:

1. Backup Quicken Mac Data File and Update the application.
 - a. Choose **File > Save a Backup**.
 - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Accept all new transactions into the appropriate registers.

After 8am ET on July 19, 2022:

Activate your Centra Credit Union accounts.

1. Click your account in the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Centra Credit Union in the search field, select the correct option and click **Continue**.
5. Enter Centra Credit Union's credentials.
 - Express Web Connect uses the same credentials you use for Centra's digital banking login.
 - Direct Connect might require credentials that do not match your digital banking credentials.

Important: If your credentials do not work, contact Centra Credit Union.

6. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under **Action**, choose **Link** to pick your existing account.
Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.
7. Click **Finish**.

Quicken Windows Web Connect

Before 6pm ET on July 18, 2022:

1. Backup Quicken Windows Data File and Update.
 - a. Choose **File > Backup and Restore > Backup Quicken File**.
 - b. Download the latest Quicken Update. Choose **Help > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Repeat this step for each account you need to update.
 - c. Accept all new transactions into the appropriate registers.

After 8am ET on July 19, 2022:

1. Deactivate your Centra Credit Union accounts.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Centra Credit Union and Account Number information.
 - g. Click **OK** to close window.
 - h. Repeat steps for any additional accounts.
2. Reconnect all applicable Centra accounts.
 - a. Download a Quicken Web Connect file from Centra Credit Union's digital banking.
 - b. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
 - c. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
 - d. Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
 - e. Repeat this step for each account you have connected to Centra.

Quicken Mac Web Connect

Before 6pm ET on July 18, 2022:

1. Backup your Quicken Mac data file and update the application.
 - a. Choose **File > Save a Backup**.
 - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Repeat this step for each account you need to update.
 - c. Accept all new transactions into the appropriate registers.

After 8am ET on July 19, 2022:

Activate your Centra Credit Union accounts.

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Centra Credit Union in the search field, select the correct option and click **Continue**.
5. Log into Centra Credit Union's digital banking and download your transactions to your computer.
Important: 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 titled **Drop download file**. Choose **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, click **Link** to pick your existing account.
Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.
8. Click **Finish**.