



Quicken for Mac Conversion Instructions

Quicken for Mac 2015

Direct Connect

Introduction

As Aerospace Federal Credit Union completes its system conversion to our new home banking platform, 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 existing AeroAccess User ID and Password for the Aerospace Federal Credit Union internet banking website and, after July 25, 2016, your new AeroAccess User ID and Password for the new Aerospace Federal Credit Union internet banking website.

NOTE: Direct Connect will require registration. Please complete your enrollment in the new AeroAccess system on or after July 25, 2016 before attempting to complete Tasks 4 & 5 outlined below.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

Documentation and Procedures

Task 1: Conversion Preparation – Before July 24, 2016

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: Connect to Aerospace Federal Credit Union for a final download before July 24, 2016

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: Deactivate Your Accounts at Aerospace Federal Credit Union on or after **July 25, 2016**

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 at **Aerospace Federal Credit Union**.

Task 4: Reactivate Your Accounts at **Aerospace Federal Credit Union** on or after **July 25, 2016**.

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 **Aerospace Federal Credit Union** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
5. Enter your Direct Connect **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

NOTE: Select "Direct Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, 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. Select **Finish**.

Thank you for making these important changes!