NUVision
CREDIT UNION

Quicken for Windows Conversion Instructions

Direct Connect to Express Web Connect

Introduction

As a result of **Nuvision Credit Union's** Online Banking 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 Direct Connect and/or online banking.

> **NOTE:** **Direct Connect** may require registration. Please contact your financial institution to verify your Direct Connect login information. **Express Web Connect** uses the same User ID and Password as the **Nuvision Credit Union** 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: Disconnect Accounts in Quicken

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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 on **Deactivate** or **Deactivate Online Payment** (only available if you use bill pay services). 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 3: Reconnect Accounts to *Nuvision Credit Union*

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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 the **Online Services** tab.

4. Click **Set up Now**.

5. Use **Advanced Setup** to activate your account.

6. Enter *Nuvision 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**.