

Quicken for Windows Conversion Instructions

Web Connect

Introduction

As **Bellco Credit Union** completes its system conversion to **a new online and mobile banking experience**, you will need to modify your Quicken settings to ensure the smooth transition of your data.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

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: Disconnect accounts at *Bellco Credit Union* or *Bellco Credit Union - Business* on or after *you upgrade*.

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 3: Reconnect accounts to *Bellco Credit Union - CO* on or after *you upgrade*.

1. To download your Quicken Web Connect file, log into Online Banking by first visiting www.bellco.org
2. Enter your credentials in the **Online Banking Member Login** area.
3. From your Online Banking dashboard, click on a specific account to view more details.
4. Click on the "Export Transactions" button located on the right portion of the details screen.
5. When prompted to choose an Export option, choose "Quicken 2003 or newer" in the dropdown.

Save the file to your computer.
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.

6. Click **File > File Import > Web Connect File**. Locate and select the Web Connect file to import.
7. **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.

IMPORTANT: 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.

8. Repeat steps for each account to be reconnected.