

# Quicken for Mac 2015-2017 Conversion Instructions



## Express Web Connect

### Introduction

As amplify 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 Amplify Credit Union Login ID and Password.

**NOTE:** **Quicken Express Web Connect** uses the same Login ID and Password as your Amplify Credit Union Online Banking Login ID and Password.

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

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#### Task 1: Conversion Preparation

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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.

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#### Task 2: Connect to Amplify Credit Union for a final download before **March 29, 2019**

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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.

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#### Task 3: Disconnect Accounts at Amplify Credit Union on or after **March 29, 2019**

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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.

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**Task 4:** Reconnect Accounts to Amplify Credit Union on or after **April 8, 2019**

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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 Amplify CU in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Enter your Amplify Online Banking **Login 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**.