

# Quicken Conversion Instructions

NASA Federal Credit Union completed its digital banking conversion, so you may need to modify your Quicken settings to ensure that your data connectivity transferred smoothly to the new system. This document contains instructions for both Windows and Mac.

**Important: Quicken Direct Connect will not be supported in the new Digital Banking system. However, Quicken Express Web Connect will be supported.**

To see which product you have, log into Quicken, go to *Tools > Account List > Edit* next to *NASA Federal > Online Services*. To learn more about the differences between Direct Connect and Express Web Connect, go to [Quicken's support website](#).

## Quicken Windows Express Web Connect

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 the last transaction to get all of your transaction history.
  - b. Repeat this step for each account you need to update.
  - c. Accept all new transactions into the appropriate registers.
3. Deactivate online banking connection for accounts connected to NASA Federal Credit Union.
  - 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 NASA Federal Credit Union and your Account Number information.
  - g. Click **OK** to close the window.
  - h. Repeat steps for any additional accounts.
4. Reconnect 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 **NASA Federal** name in the search field and click **Next**.
  - e. Enter your **NASA Federal Online Banking** credentials.

**Important:** If your credentials do not work, contact NASA Federal 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 Express Web Connect

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. Accept all new transactions into the appropriate registers.

3. Activate online banking connection for accounts connected to NASA Federal.

- a. Select your account under the Accounts list on the left side.
- b. Choose **Accounts > Settings**.
- c. Select **Set up transaction download**.
- d. Enter **NASA Federal** in the search field, select the correct option and click **Continue**.
- e. Enter your **NASA Federal Online Banking** credentials.  
**Important:** If your credentials do not work, contact NASA Federal.
- f. 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.**
- g. Click **Finish**

# QuickBooks Conversion Instructions

NASA Federal Credit Union completed its digital banking conversion, so you may need to modify your QuickBooks settings to ensure that your data connectivity transferred smoothly to the new system. This document contains instructions for both Windows and Mac.

**Important: QuickBooks Direct Connect will not be supported in the new Digital Banking system. However, QuickBooks Express Web Connect will be supported.**

## QuickBooks Windows Express Web Connect

1. Backup QuickBooks Windows Data File & Update.
  - a. Choose **File > Back Up Company > Create Local Backup**.
  - b. Download the latest QuickBooks Update. Choose **Help > Update QuickBooks Desktop**.
2. Complete a final transaction download and match downloaded transactions.
  - a. Complete one last transaction update before the change to get all your transaction history up to date.
  - b. Accept all new transactions into the appropriate registers. (required)
3. Deactivate online banking connection for accounts connected to financial institution that is requesting this change.
  - a. Choose **Lists** menu > **Chart of Accounts**.
  - b. Right-click the first account you want to deactivate and choose **Edit Account**.
  - c. Click the **Bank Settings** tab in the Edit Account window.
  - d. Select **Deactivate All Online Services** and click **Save & Close**.
  - e. Click **OK** for any alerts or messages that may appear with the deactivation.
  - f. Repeat steps for any additional accounts that you need to deactivate.
4. Reconnect online banking connection for accounts that apply.
  - a. Go to **Banking** and select **Bank Feeds**, then select **Set Up Bank Feed for an Account**.
  - b. Enter the account name and select **Next**.
  - c. You'll see the **My Company** sign in page. Sign in using your Intuit Account user ID.
  - d. Enter your **NASA Federal Online Banking** account info, then select **Connect**.  
QuickBooks will connect to the bank's server.  
**Note:** You may get a prompt for a one-time passcode (OTP).
  - e. Select the account(s) you want to connect to QuickBooks, then select **Connect**.

- f. Select **Close**. In the Select Bank Account dialog select Use an existing QuickBooks account.  
**Important: Do NOT select “Create a new QuickBooks account” unless you intend to add a new account to QuickBooks.**
- g. In the drop-down list, choose your QuickBooks account(s) and click Continue. Confirm by selecting **OK**.

## QuickBooks Mac Express Web Connect

5. Backup your QuickBooks Mac data file & update the application.
  - a. Choose **File > Backup**.
  - b. Download the latest QuickBooks Update. Choose QuickBooks > **Check for QuickBooks Updates**.
6. Complete a final transaction download.
  - c. Complete last transaction update before the change to get all your transaction history up to date.
  - d. Repeat this step for each account you need to update.
  - e. Accept all new transactions into the appropriate registers. (required)
7. Deactivate online banking connection for accounts connected to the financial institution that is requesting this change.
  - a. Choose **Lists > Chart of Accounts**.
  - b. Select the first account you would like to deactivate and choose **Edit > Edit Account**.
  - c. Select **Online Settings** in the Edit Account window.
  - d. In the Online Account Information window, choose **Not Enabled** from the **Download Transactions** list and click **Save**.
  - e. Click **OK** for any dialog boxes that may appear with the deactivation.
  - f. Repeat steps for any additional accounts that apply.
8. Reconnect online banking connection for accounts that apply.
  - h. Go to **Banking** and select **Bank Feeds**, then select **Set Up Bank Feed for an Account**.
  - i. Enter the account name and select **Next**.
  - j. You'll see the **My Company** sign in page. Sign in using your Intuit Account user ID.
  - k. Enter your **NASA Federal Online Banking** account info, then select **Connect**.  
QuickBooks will connect to the bank's server.  
**Note:** You may get a prompt for a one-time passcode (OTP).
  - l. Select the account(s) you want to connect to QuickBooks, then select **Connect**.

- m. Select **Close**. In the Select Bank Account dialog select Use an existing QuickBooks account.  
**Important: Do NOT select “Create a new QuickBooks account” unless you intend to add a new account to QuickBooks.**
- n. In the drop-down list, choose your QuickBooks account(s) and click Continue. Confirm by selecting **OK**.

## Mint Conversion Information

NASA Federal Credit Union completed its digital banking conversion, so your online banking accounts should reconcile showing your transaction history.

In the event that your accounts do not display current transactions, click refresh to update the account. After the download completes, click the Transactions tab to view up to 90 days of transaction history.