Using MSGCU's Online Banking

QUICKEN ONLINE SETUP

Contents

Introduction

You will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your username and password for MSGCU's Online Banking. Express Web Connect uses the same credentials as when you log in to your account at msgcu.org.

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.

Thank you for making these important changes!

Express Web Connect - Windows

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** > **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.

Disconnect Accounts in Quicken

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. Then remove the financial institution name and account number. Click **OK** to close the window.

6. Repeat steps for each MSGCU account to be disconnected.

Reconnect Accounts

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 *Michigan Schools and Government* 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 additional security questions. Answer them as prompted.

9. Ensure you associate the account to the appropriate account already listed in Quicken. Select **Link to an existing account** and then 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**.

Express Web Connect -Mac

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** > **Search**. Search "Backing Up" and select **Backing up data files.** Follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** > **Search**. Search "Updates" and select **Check for Updates**. Follow the instructions.

Task 2: Disconnect Accounts in Quicken

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*.*

Task 3: Reconnect Accounts

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 *Michigan Schools and Government* in the **Search** field. Select the name in the **Results** list and click **Continue**.

5. Enter your **Username** and **Password** and click **Continue**.

6. If you are prompted for extra security questions, answer them 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 unless you intend to add a new account to Quicken.

8. Select **Finish**.

Web Connect - Windows

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** > **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 > Quicken Help**. Search for *Update Software* and follow the instructions.

Task 2: Disconnect Accounts in Quicken

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 and then remove the financial institution name and account number listed. Click **OK** to close the window.

6. Repeat steps for each account to be disconnected.

Task 3: Reconnect Accounts

1. Download your Quicken Web Connect file from msgcu.org by navigating to **Accounts > History**. Select **Export** on the right of your screen.

   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.

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

3. **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.

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> <u>IMPORTANT</u>: 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.

4. Repeat steps for each account to be reconnected.

Web Connect - Mac

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** > **Search**. Search "Backing Up" and select **Backing up data files.** Follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** > **Search**. Search "Updates" and select **Check for Updates**. Follow the instructions.

Task 2: Connect Accounts

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 *Michigan Schools and Government* in the Search field, select the name in the Results list and click **Continue**.

5. Log in to your account at msgcu.org by navigating to **Accounts > History**. Select **Export** on the right of your screen.

    <u>NOTE</u>: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

6. Drag and drop the downloaded file into the box **Drop download file**. Select "Web 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.

    <u>IMPORTANT</u>: Do **NOT** select "**ADD**" under the action column unless you intend to add a new account to Quicken.

8. Click **Finish**.

9. Repeat steps for each account to be connected.