



Conversion Instructions for Quicken, QuickBooks & Mint

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Quickbooks for Mac Conversion Instructions

Web Connect

Introduction

As **Palmetto Citizens FCU** completes its system conversion, you will need to modify your QuickBooks 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'll 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 the **Help** menu **and use the Search bar available at the top**. Search for **Back Up** and follow the instructions on screen. The first time you do a backup, QuickBooks will guide you through setting backup preferences.
2. Download the latest QuickBooks Update. For instructions to download an update choose **Help** menu and use the Search bar available at the top. Search for **Update QuickBooks**, select **Check for QuickBooks Updates** and follow the instructions.

Task 2: Connect to **Palmetto Citizens FCU** for a final download before **5/13/2019**

3. Log in to <https://www.palmettocitizens.org/> and download your QuickBooks Web Connect File.
4. Click **File > Import > From Web Connect**.
5. Link your bank account with the existing QuickBooks account and click **Continue**.
6. Repeat steps for each account.

Task 3: Match Downloaded Transactions

If new transactions were received from your connection, accept all new transactions into the appropriate registers.

If you need assistance matching transactions, choose the **Help** menu and use the Search bar available at the top. Search for *Updating Your Register*, select the article with that name and follow the instructions.

NOTE: All transactions must be matched or added to the register prior disconnecting your accounts.

Task 4: Disconnect Accounts at *Palmetto Citizens FCU* on or after **5/14/2019**

7. Choose **Lists** menu > **Chart of Accounts**.
8. Select the account you want to deactivate.
9. Choose **Edit** menu > **Edit Account**.
10. In the **Edit Account** window, click the **Online Settings** button.
11. In the **Online Account Information** window, choose **Not Enabled** from the **Download Transaction** list and click **Save**.
12. Click **OK** for any dialog boxes that may appear with the deactivation.
13. Repeat steps for each account to be disconnected.

Task 5: Reconnect Accounts to *Palmetto Citizens FCU* on or after **5/14/2019**

14. Log in to <https://www.palmettocitizens.org/> and download your QuickBooks Web Connect File.

NOTE: 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.

15. Click File > Import > From Web Connect.
16. If prompted for connectivity type, select Web Connect.
17. The **Account Association** window displays during setup. For each account you wish to download into QuickBooks, click **Select an Account** to choose the appropriate existing account register.

IMPORTANT: Do NOT select “New” under the action column.

18. Click **Continue**.
19. Click **OK** to any informational prompts.
20. Add or match all downloaded transactions in the **Downloaded Transactions** window.
21. Repeat steps for each account to be reconnected.

Quickbooks for Windows Conversion Instructions

Web Connect

Introduction

As **Palmetto Citizens FCU** completes its system conversion, you will need to modify your QuickBooks 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'll 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 > **QuickBooks Help**. Search for **Back Up** and follow the instructions.
2. Download the latest QuickBooks Update. For instructions to download an update, choose **Help** menu > **QuickBooks Help**. Search for **Update QuickBooks**, then select **Update QuickBooks** and follow the instructions.

NOTE: If multiple computers do not use the same QuickBooks data file, skip step 3. QuickBooks activities such as **Online Banking** cannot be performed in multi-user mode because of the way the activities interact with a company data file.

3. Switch to single user mode. For instructions to switch to single user mode, choose **Help** menu > **QuickBooks Help**. Search for **Switch to Single User Mode** and follow the instructions.

NOTE: If you are not using Classic Mode (Register Mode), enable it for the conversion. You can change it back after the conversion is complete.

4. Enable Classic Mode (Register Mode).
5. For instructions to enable Classic Mode (Register Mode), choose **Help** menu > **QuickBooks Help**. Search for **Banking Feed Modes**, select **Bank Feeds Modes overview**, scroll down, and follow the instructions.

Task 2: Connect to *Palmetto Citizens FCU* for a final download before **5/13/2019**

6. Log in to *Palmetto Citizens FCU* and download your QuickBooks Web Connect file.
7. Click **File > Utilities > Import > Web Connect Files**.
8. Link your bank account with the existing QuickBooks account and click **Continue**.
9. Repeat steps for each account.

Task 3: Match Downloaded Transactions

If new transactions were received from your connection, accept all new transactions into the appropriate registers.

If you need assistance matching transactions, choose **Help menu > QuickBooks Help**. Search for **Matching Transactions** and follow the instructions.

NOTE: All transactions must be matched or added to the register prior to disconnecting your accounts.

Task 4: Disconnect Accounts at *Palmetto Citizens FCU* on or after **5/14/2019**

10. Choose the **Lists** menu > **Chart of Accounts**.
11. Select the account you want to deactivate.
12. Click **Edit** menu > **Edit Account**.
13. Click on the **Bank Feed Settings** tab in the **Edit Account** window.
14. Select **Deactivate All Online Services** and click **Save & Close**.
15. Click **OK** for any dialog boxes that may appear with the deactivation.
16. Repeat steps for each account to be disconnected.

Task 5: Reconnect Accounts to *Palmetto Citizens FCU* on or after **5/14/2019**

17. Log in to <https://www.palmettocitizens.org/> and download your QuickBooks Web Connect file.
18. Click **File > Utilities > Import > Web Connect Files**.

NOTE: 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.

19. If prompted for connectivity type, select **Web Connect**.

20. Click the **Import new transactions now** radio button, then click **OK**.

NOTE: If you previously removed the check from the “Always give me the option of saving to a file...” option, then this dialog will not display.

21. In the **Select Bank Account** dialog, click **Use an existing QuickBooks** account.

22. In the corresponding drop-down list, select your QuickBooks account, and click **Continue**.

23. Confirm the prompt by clicking **OK**.

24. Repeat steps for each account to be reconnected.

IMPORTANT: Verify that all transactions downloaded successfully into your account registers.

Task 6: Re-enable Express Mode (if necessary)

NOTE: If you prefer Classic Mode (Register Mode), you are finished with your conversion. If you use Express Mode for online banking, you may now re-enable the mode.

For instructions to enable Express Mode, choose **Help > QuickBooks Help**. Search for **Banking Feed Modes**, then select **Bank Feed Modes overview**, and follow the instructions.

Quicken for Windows Conversion Instructions

Express Web Connect

Introduction

As **Palmetto Citizens FCU** completes its system conversion, you will need to modify your QuickBooks 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'll 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 > **QuickBooks Help**. Search for **Back Up** and follow the instructions.
2. Download the latest QuickBooks Update. For instructions to download an update, choose **Help** menu > **QuickBooks Help**. Search for **Update QuickBooks**, then select **Update QuickBooks** and follow the instructions.

NOTE: If multiple computers do not use the same QuickBooks data file, skip step 3. QuickBooks activities such as **Online Banking** cannot be performed in multi-user mode because of the way the activities interact with a company data file.

3. Switch to single user mode. For instructions to switch to single user mode, choose **Help** menu > **QuickBooks Help**. Search for **Switch to Single User Mode** and follow the instructions.

NOTE: If you are not using Classic Mode (Register Mode), enable it for the conversion. You can change it back after the conversion is complete.

4. Enable Classic Mode (Register Mode).
5. For instructions to enable Classic Mode (Register Mode), choose **Help** menu > **QuickBooks Help**. Search for **Banking Feed Modes**, select **Bank Feeds Modes overview**, scroll down, and follow the instructions.

Task 2: Connect to *Palmetto Citizens FCU* for a final download before **5/13/2019**

6. Log in to *Palmetto Citizens FCU* and download your QuickBooks Web Connect file.
7. Click **File > Utilities > Import > Web Connect Files**.
8. Link your bank account with the existing QuickBooks account and click **Continue**.
9. Repeat steps for each account.

Task 3: Match Downloaded Transactions

If new transactions were received from your connection, accept all new transactions into the appropriate registers.

If you need assistance matching transactions, choose **Help menu > QuickBooks Help**. Search for **Matching Transactions** and follow the instructions.

NOTE: All transactions must be matched or added to the register prior to disconnecting your accounts.

Task 4: Disconnect Accounts at *Palmetto Citizens FCU* on or after **5/14/2019**

10. Choose the **Lists** menu > **Chart of Accounts**.
11. Select the account you want to deactivate.
12. Click **Edit** menu > **Edit Account**.
13. Click on the **Bank Feed Settings** tab in the **Edit Account** window.
14. Select **Deactivate All Online Services** and click **Save & Close**.
15. Click **OK** for any dialog boxes that may appear with the deactivation.
16. Repeat steps for each account to be disconnected.

Task 5: Reconnect Accounts to *Palmetto Citizens FCU* on or after **5/14/2019**

17. Log in to <https://www.palmettocitizens.org/> and download your QuickBooks Web Connect file.
18. Click **File > Utilities > Import > Web Connect Files**.

NOTE: 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.

19. If prompted for connectivity type, select **Web Connect**.

20. Click the **Import new transactions now** radio button, then click **OK**.

NOTE: If you previously removed the check from the “Always give me the option of saving to a file...” option, then this dialog will not display.

21. In the **Select Bank Account** dialog, click **Use an existing QuickBooks** account.

22. In the corresponding drop-down list, select your QuickBooks account, and click **Continue**.

23. Confirm the prompt by clicking **OK**.

24. Repeat steps for each account to be reconnected.

IMPORTANT: Verify that all transactions downloaded successfully into your account registers.

Task 6: Re-enable Express Mode (if necessary)

NOTE: If you prefer Classic Mode (Register Mode), you are finished with your conversion. If you use Express Mode for online banking, you may now re-enable the mode.

For instructions to enable Express Mode, choose **Help > QuickBooks Help**. Search for **Banking Feed Modes**, then select **Bank Feed Modes overview**, and follow the instructions.

Quicken for Mac 2015-2017 Conversion Instructions

Express Web Connect

Introduction

As **Palmetto Citizens FCU** completes its system conversion, you will need to modify your QuickBooks 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'll 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**, 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.

Task 2: Connect to **Palmetto Citizens FCU** for a final download before **5/13/2019**

3. Select your account under the **Accounts** list on the left side.
4. Choose **Accounts** menu > **Update Selected Online Account**.
5. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) you use for online banking or investing.

Task 3: Disconnect Accounts at **Palmetto Citizens FCU** on or after **5/14/2019**

6. Select your account under the **Accounts** list on the left side.
7. Choose **Accounts** menu > **Settings**.
8. Select **Troubleshooting** > **Deactivate Downloads**.

9. Repeat steps for each account to be disconnected.

Task 4: Reconnect Accounts to *Palmetto Citizens FCU* on or after *5/14/2019*

10. Select your account under the **Accounts** list on the left side.

11. Choose **Accounts** menu > **Settings**.

12. Select **Set up transaction download**.

13. Enter *Palmetto Citizens FCU* in the **Search** field, select the name in the **Results** list and click **Continue**.

14. Enter your **User Id** and **Password** and click **Continue**.

15. If the bank requires extra information, enter it to continue.

NOTE: Select “Express Web Connect” or “Quicken Connect” for the “Connection Type” if prompted.

16. 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.

17. Select **Finish**.

QuickBooks Online Edition Conversion Instructions

QuickBooks Online Edition (QBO v78)

Introduction

As Palmetto Citizens FCU completes its system conversion; you will need to modify your QuickBooks Online Edition 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 **[User ID and Password]** for the Palmetto Citizens FCU website.

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.

Documentation and Procedures

Conversion – Information only

QuickBooks Online data is stored on Intuit servers in the cloud. Since we update your records with every change, we cannot restore your file to a previous point in time.

QuickBooks Online automatically updates your selected version so you are always on the latest release.

IMPORTANT: QuickBooks Online edition connectivity services may be interrupted up to 3-5 business days after the conversion is complete.

Task 1: Connect to **Palmetto Citizens FCU** for a final download by **5/13/2019**

NOTE: Please skip to page 4 if you **Manually Import Transactions**.

1. Choose **Transactions > Banking**.
2. In the upper right corner, click **Add Account**.
3. Enter **Palmetto Citizens FCU** and click **Find**.
4. Click the link for **Palmetto Citizens FCU**.
5. Type your **User Id** and **Password** and click **Log In**.
6. If the bank requires extra information, enter it to continue.
7. Choose an **account type** for each account you're connecting.

8. Click **Connect** to download up to 90 days of transactions.

NOTE: If you need a shorter date range, click **Need a shorter date range?** at the top and choose between **0**, **7**, or **30** days.

9. After your download finishes, click the **New Transactions** tab to see what was downloaded.

Task 2: Match Downloaded Transactions

10. If new transactions were received from your connection, accept all new transactions on the **Transactions > Banking** page. Simply check off all the New/Matched transactions and click **Batch Action** to "**Accept Selected**".
11. If you need assistance matching transactions, choose **Help menu > Search for Matching Transactions** and follow the instructions.

Task 3: Deactivate Your Account(s) At **Palmetto Citizens FCU** on or after **5/14/2019**

12. Choose **Transactions > Banking**.
13. Click on the account you'd like to disconnect, then click the **Pencil Icon**.
14. Click on **Edit Account Info**.
15. Check the box next to **Disconnect this account on save**.
16. Click **Save**.
17. Repeat steps 2—6 for each account at **Palmetto Citizens FCU**.

Task 4: Re-activate Your Account(s) at **Palmetto Citizens FCU** on or after **5/21/2019**

18. Choose **Transactions > Banking**.
19. In the upper right corner, click **Add Account**
20. Enter **Palmetto Citizens FCU** and click **Find**.
21. Click the link for **Palmetto Citizens FCU**.
22. Type your **User ID** and **Password**. Click **Log In**.
23. Ensure you associate the account for **Palmetto Citizens FCU** to the appropriate account already listed under **QuickBooks Accounts**. You will want to select the matching accounts in the drop-down menu.

IMPORTANT: Do **NOT** select **+Add new**. If you are presented with accounts you do not want to track in this data file, **Uncheck** the box next to the **Account name**.

24. After all accounts have been matched, click **Connect**.

25. When the download is finished click **I'm done. Let's go!**

Task 5: Excluding Duplicate Transactions

26. Choose **Transactions > Banking**.

27. In the **New Transactions** section, click the checkboxes for the transactions you want to exclude.

28. Click **Batch Actions > Exclude Selected**.

NOTE: If you accidentally exclude a transaction, you can include it again.

Task 6: Undo Excluded Transactions

29. Choose **Transactions > Banking**.

30. Click the **Excluded** tab.

31. Click the checkboxes for the transactions you want to include.

32. Click **Batch Actions > Undo**.

33. Transactions will appear again in the **New Transactions** tab for you to work with.

Additional Instructions: Manually Import Transactions

34. Log in to **Palmetto Citizens FCU** website at <https://www.palmettocitizens.org/>

35. Download one of the following Web Connect files.

a. .qbo (QuickBooks)

b. .qfx (Quicken)

36. In **QuickBooks Online**, choose **Transactions > Banking**.

37. In the upper right corner, click **File Upload**.

38. Click Browse and select **Palmetto Citizens FCU** Web Connect file from your computer.

39. Click **Next**.

40. In the drop-down menu, select the account where you'd like to upload the transactions.

41. When the download is finished click **I'm done. Let's go!**

42. After your download finishes, click the **New Transactions** tab to see what was downloaded.

Thank you for making these important changes!

Mint Conversion Instructions

Mint.com (V40)

Introduction

As Palmetto Citizens FCU completes its system conversion, Mint aggregation services may be interrupted for up to 5 business days.


NOTE: You will be able to access online banking information by directly logging into your financial institution website during the interrupted time.

Mint Conversion Information

Mint.com data is stored on Intuit cloud servers. Data is updated with every change and cannot restore data to a previous point in time.

For a successful account update, do not login into Mint.com until 5 business days after **5/21/2019**.

During this time, the Mint.com server will automatically make the system conversion for your activated accounts. If you login into Mint.com during this time, you may see duplicate accounts or an error displayed. Please do not attempt to change the status or make any changes in Mint.com during this time. After 5 business days, the accounts should reconcile showing your transaction history available.

In the event that your accounts do not display current transactions after 5 business days, you may log back into Mint.com and click refresh  to update the account. After the download completes, click the Transactions tab to view up to 90 days of transaction history.

Thank you for your patience during these changes!

Quicken for Windows Conversion Instructions

Web Connect to Direct Connect

Introduction

As **Palmetto Citizens FCU** completes its system conversion, you will need to modify your QuickBooks 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'll need your User ID and Password for each Financial Institution.

NOTE: **Web Connect** uses the same User ID and Password as the **Palmetto Citizens FCU** website. **Direct Connect** may require registration. Please contact **Palmetto Citizens FCU** to verify your Direct Connect login information.

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. Back up 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: Connect to **Palmetto Citizens FCU** for a final download before **5/13/2019**

3. Download your Quicken Web Connect file from <https://www.palmettocitizens.org/>.
4. Click **File > File Import > Web Connect File**. Locate and select the Web Connect file to import.
5. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.
6. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

NOTE: If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

Task 3: Disconnect Accounts at *Palmetto Citizens FCU* on or after **5/14/2019**

7. Choose **Tools** menu > **Account List**.
8. Click the **Edit** button of the account you want to deactivate.
9. In the **Account Details** dialog, click on the **Online Services** tab.
10. Click **Deactivate**. Follow the prompts to confirm the deactivation.
11. Click on the **General** tab.
12. Remove the financial institution name and account number. Click **OK** to close the window.
13. Repeat steps for each account to be disconnected.

Task 4: Reconnect Accounts to *Palmetto Citizens FCU* on or after **5/14/2019**

14. Choose Tools menu > Account List.
15. Click the Edit button of the account you want to activate.
16. In the Account Details dialog, click on the Online Services tab.
17. Click Set up Now.
18. Use Advanced Setup to activate your account.
19. Enter *Palmetto Citizens FCU* in the search field, select the name in the list and click Next.
20. If presented with the Select Connection Method screen, select **Direct Connect**.
21. Type your Direct Connect **User ID** and **Password** and click **Connect**.
22. 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 want 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**.

23. After all accounts have been matched, click **next**. You will receive confirmation that your accounts have been added.
24. Click **Done** or **Finish**.

Quicken for Mac 2007 Conversion Instructions

Web Connect to Direct Connect

Introduction

As **Palmetto Citizens FCU** completes its system conversion, you will need to modify your QuickBooks 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'll need your User ID and Password for each Financial Institution.

NOTE: **Web Connect** uses the same User ID and Password as the **Palmetto Citizens FCU** website. **Direct Connect** may require registration. Please contact **Palmetto Citizens FCU** to verify your Direct Connect login information.

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**, select **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 **Updates**, select **Check for Updates**, and follow the instructions.

Task 2: Connect to **Palmetto Citizens FCU** for a final download before **5/13/2019**

3. Choose **Online** menu > **Download Transactions**.
4. Select your account from the drop-down list.
5. Click **Download** to access <https://www.palmettocitizens.org/>
6. Enter your **User ID** and **Password** to login to the website. Download your transactions through **5/13/2019** into Quicken.
7. Repeat the download process for each account you have (such as checking, savings, credit cards and brokerage).

8. Once all accounts have been downloaded, accept all transactions into your Quicken account registers.

Task 3: Disconnect Accounts At *Palmetto Citizens FCU* on or after **5/14/2019**

9. Choose **Lists** menu > **Accounts**.
10. Select the account to deactivate and click **Edit**.
11. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
12. Remove the information within the **Account Number** and **Routing Number** fields.
13. Click **OK** to save your edits.
14. Repeat steps for each account to be disconnected.
15. Verify your account list does not display a blue online circle icon for the accounts you are disconnecting.

Task 4: Reconnect Accounts to *Palmetto Citizens FCU* on or after **5/14/2019**

16. Choose **Lists** menu > **Accounts**.
17. Select your first disabled account and click **Edit**.
18. Click the **Financial Institution** drop-down list and select **Change Financial Institution**.
19. Click on **Update List**.
20. In the **Financial Institutions** dialog, enter, then select *Palmetto Citizens FCU* from the list and click **Use**.
21. Enter your Direct Connect **User ID** and **Password**. Click **OK**.
22. In the **Add Online Services** dialog, match your first account to the appropriate account number. Click **OK**.

NOTE: Each account will be displayed below **“Use an existing account.”**

23. Click **OK**.
24. Click **OK** to close the **Edit Register** page.
25. Choose **Lists** menu > **Accounts**. Verify that each account you are reconnecting has a blue online circle for online services.

Quicken for Mac 2007-2015 Conversion Instructions

Web Connect to Direct Connect

Introduction

As **Palmetto Citizens FCU** completes its system conversion, you will need to modify your QuickBooks 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'll need your User ID and Password for each Financial Institution.

NOTE: **Web Connect** uses the same User ID and Password as the **Palmetto Citizens FCU** website. **Direct Connect** may require registration. Please contact **Palmetto Citizens FCU** to verify your Direct Connect login information.

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**, 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.

Task 2: Connect to **Palmetto Citizens FCU** for a final download before **5/13/2019**

3. Select your account under the **Accounts** list on the left side.
4. Choose **Accounts** menu > **Update Selected Online Account**.
5. Sign in to online banking and download transactions for an account.
6. Import the transactions.
7. Repeat steps for each account that you use for online banking or investing.

Task 3: Connect Accounts to *Palmetto Citizens FCU* on or after **5/13/2019**

8. Select your account in the **Accounts** list on the left sidebar.
9. Choose **Accounts** menu > **Settings**.
10. Select **Set up transaction download**.
11. Enter *Palmetto Citizens FCU* in the **Search** field, select the institution name in the **Results** list and click **Continue**.
12. Enter your Direct Connect **User Id** and **Password** and click **Continue**.
13. If the bank requires extra information, enter it to continue.

NOTE: Select “Direct Connect” for the “Connection Type” if prompted.

14. In the “**Accounts Found**” screen, associate each new account to accounts in your Quicken data file. Under the **Action** column, select “**Link**” to pick your existing account. When complete, click Finish.

IMPORTANT: Do **NOT** select “**ADD**” under the action column unless you intend to add a new account to Quicken.

QuickBooks for Windows Conversion Instructions

Web Connect to Direct Connect

Introduction

As **Palmetto Citizens FCU** completes its system conversion; you will need to modify your QuickBooks 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'll need your User ID and Password for each Financial Institution.

NOTE: **Web Connect** uses the same User ID and Password as the **Palmetto Citizens FCU** website. **Direct Connect** may require registration. Please contact **Palmetto Citizens FCU** to verify your Direct Connect login information.

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. Back up your data file. For instructions to back up your data file, choose **Help** menu > **QuickBooks Help**. Search for **Back Up** and follow the instructions.
2. Download the latest QuickBooks Update. For instructions to download an update, choose **Help** menu > **QuickBooks Help**. Search for **Update QuickBooks**, then select **Update QuickBooks** and follow the instructions.

NOTE: If multiple computers do not use the same QuickBooks data file, skip step 3. QuickBooks activities such as Online Banking cannot be performed in multi-user mode because of the way the activities interact with a company data file.

3. Switch to single user mode. For instructions to switch to single user mode, choose **Help** menu > **QuickBooks Help**. Search for **Switch to Single User Mode** and follow the instructions.

NOTE: If you are not using Classic Mode (Register Mode), enable it for the conversion. You can change it back after the conversion is complete.

4. Enable Classic Mode (Register Mode).
5. For instructions to enable Classic Mode (Register Mode), choose **Help** menu > **QuickBooks Help**. Search for **Banking Feed Modes**, select **Bank Feeds Modes overview**, scroll down, and follow the instructions.

Task 2: Connect to **Palmetto Citizens FCU** for a final download before **5/13/2019**

6. Log in to **Palmetto Citizens FCU** and download your QuickBooks Web Connect file.
7. Click **File > Utilities > Import > Web Connect Files**.
8. Link your bank account with the existing QuickBooks account and click **Continue**.
9. Repeat steps for each account.

Task 3: Match Downloaded Transactions

If new transactions were received from your connection, accept all new transactions into the appropriate registers.

If you need assistance matching transactions, choose **Help menu > QuickBooks Help**. Search for **Matching Transactions** and follow the instructions.

NOTE: All transactions must be matched or added to the register prior to disconnecting your accounts.

Task 4: Disconnect Accounts at **Palmetto Citizens FCU** on or after **5/13/2019**

10. Choose the **Lists** menu > **Chart of Accounts**.
11. Select the account you want to deactivate.
12. Click **Edit** menu > **Edit Account**.
13. Click on the **Bank Feed Settings** tab in the **Edit Account** window.
14. Select **Deactivate All Online Services** and click **Save & Close**.
15. Click **OK** for any dialog boxes that may appear with the deactivation.
16. Repeat steps for each account to be disconnected.

Task 5: Reconnect Accounts to *Palmetto Citizens FCU* on or after **5/14/2019**

17. Choose **Banking** menu > **Bank Feeds** > **Set Up Bank Feed for an Account**.
18. Enter, and then select *Palmetto Citizens FCU*. Click **Next**.
19. If prompted for connectivity type, select **Direct Connect**.
20. Link your bank account with the existing QuickBooks account and click **Connect**.

IMPORTANT: Verify that all transactions downloaded successfully into your account registers.

Task 6: Re-enable Express Mode (if necessary)

NOTE: If you prefer Classic Mode (Register Mode), you are finished with your conversion. If you use Express Mode for online banking, you may now re-enable the mode.

For instructions to enable Express Mode, choose **Help** > **QuickBooks Help**. Search for **Banking Feed Modes**, then select **Bank Feed Modes overview**, and follow the instructions.

QuickBooks for Mac Conversion Instructions

Web Connect to Direct Connect

Introduction

As **Palmetto Citizens FCU** completes its system conversion; you will need to modify your QuickBooks 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'll need your User ID and Password for each Financial Institution.

NOTE: **Web Connect** uses the same User ID and Password as the **Palmetto Citizens FCU** website. **Direct Connect** may require registration. Please contact **Palmetto Citizens FCU** to verify your Direct Connect login information.

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. Back up your data file. For instructions to back up your data file choose **Help** menu **and use the Search bar available at the top**. Search for **Back Up** and follow the instructions on screen. The first time you do a backup, QuickBooks will guide you through setting backup preferences.
2. Download the latest QuickBooks Update. For instructions to download an update choose **Help** menu and use the Search bar available at the top. Search for **Update QuickBooks**, select **Check for QuickBooks Updates** and follow the instructions.

Task 2: Connect to **Palmetto Citizens FCU** for a final download before **5/13/2019**

3. Log in to <https://www.palmettocitizens.org/> and download your QuickBooks Web Connect File.
4. Click **File > Import > From Web Connect**.
5. Link your bank account with the existing QuickBooks account and click **Continue**.
6. Repeat steps for each account.

Task 3: Match Downloaded Transactions

If new transactions were received from your connection, accept all new transactions into the appropriate registers.

If you need assistance matching transactions, choose the **Help** menu and use the Search bar available at the top. Search for **Updating Your Register**, *select the article with that name* and follow the instructions.

NOTE: All transactions must be matched or added to the register prior to disconnecting your accounts.

Task 4: Disconnect Accounts at *Palmetto Citizens FCU* on or after 5/14/2019

7. Choose **Lists** menu > **Chart of Accounts**.
8. Select the account you want to deactivate.
9. Choose **Edit** menu > **Edit Account**.
10. In the **Edit Account** window, click **Online Settings**.
11. In the **Online Account Information** window, choose **Not Enabled** from the **Download Transaction** list and click **Save**.
12. Click OK for any dialog boxes that may appear with the deactivation.
13. Repeat steps for each account to be disconnected.

Task 5: Reconnect Accounts to *Palmetto Citizens FCU* on or after 5/14/2019

14. Choose **Banking** menu > **Online Banking Setup**.
15. Enter, and then select **Palmetto Citizens FCU** from **Financial Institution** list. Click **Next**.
16. Follow instructions in the wizard. If prompted for connectivity type, select **Direct Connect**.
17. The Online Banking Assistant window displays during setup. Select 'Yes, my account has been activated for QuickBooks online services', then click **Next**.
18. Enter credentials and click **Sign In**.
19. For each account you wish to download into QuickBooks, click **Select an Account** to choose the appropriate existing account register.

IMPORTANT: Do **NOT** select "**New**" under the action column.

20. Click **Next**, then **Done**.

21. Add or match all downloaded transactions in the **Downloaded Transactions** window.

Task 6: Re-enable Express Mode (if necessary)

NOTE: If you prefer Classic Mode (Register Mode), you are finished with your conversion. If you use Express Mode for online banking, you may now re-enable the mode.

For instructions to enable Express Mode, choose **Help > QuickBooks Help**. Search for **Banking Feed Modes**, then select **Bank Feed Modes overview**, and follow the instructions.

Quicken for Windows Conversion Instructions

Express Web Connect to Direct Connect

Introduction

As **Palmetto Citizens FCU** completes its system conversion, you will need to modify your QuickBooks 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'll need your User ID and Password for each Financial Institution.

NOTE: **Web Connect** uses the same User ID and Password as the **Palmetto Citizens FCU** website. **Direct Connect** may require registration. Please contact **Palmetto Citizens FCU** to verify your Direct Connect login information.

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: Connect to **Palmetto Citizens FCU** for a final download before **5/13/2019**

3. Choose **Tools** menu > **One Step Update**.
4. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.
5. In the **One Step Update Settings** dialog, make sure all items are checked and click **Update Now**.
6. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

NOTE: If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

Task 3: Disconnect Accounts At *Palmetto Citizens FCU* on or after **5/14/2019**

7. Choose **Tools** menu > **Account List**.
8. Click the **Edit** button of the account you want to deactivate.
9. In the **Account Details** dialog, click on the **Online Services** tab.
10. Click **Deactivate**. Follow the prompts to confirm the deactivation.
11. Click on the **General** tab.
12. Remove the financial institution name and account number. Click **OK** to close the window.
13. Repeat steps for each account to be disconnected.

Task 4: Reconnect Accounts to *Palmetto Citizens FCU* on or after **5/14/2019**

14. Choose Tools menu > Account List.
15. Click the Edit button of the account you want to activate.
16. In the Account Details dialog, click on the Online Services tab.
17. Click Set up Now.
18. Use Advanced Setup to activate your account.
19. Enter *Palmetto Citizens FCU* in the search field, select the name in the list and click Next.
20. If presented with the Select Connection Method screen, select **Direct Connect**.
21. Type your Direct Connect **User ID** and **Password** and click **Connect**.
22. 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 want 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**.

23. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
24. Click **Done** or **Finish**.

Quicken for 2015-2017 Conversion Instructions

Express Web Connect to Direct Connect

Introduction

As **Palmetto Citizens FCU** completes its system conversion, you will need to modify your QuickBooks 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'll need your User ID and Password for each Financial Institution.

NOTE: **Web Connect** uses the same User ID and Password as the **Palmetto Citizens FCU** website. **Direct Connect** may require registration. Please contact **Palmetto Citizens FCU** to verify your Direct Connect login information.

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**, 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.

Task 2: Connect to **Palmetto Citizens FCU** for a final download before **5/13/2019**

3. Select your account under the **Accounts** list on the left side.
4. Choose **Accounts** menu > **Update Selected Online Account**.
5. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Disconnect Accounts At **Palmetto Citizens FCU** on or after **5/14/2019**

6. Select your account under the **Accounts** list on the left side.
7. Choose **Accounts** menu > **Settings**.
8. Select **Troubleshooting** > **Deactivate Downloads**.
9. Repeat steps for each account to be deactivated.

Task 4: Reconnect Accounts to *Palmetto Citizens FCU* on or after *5/14/2019*

10. Select your account under the **Accounts** list on the left side.
11. Choose **Accounts** menu > **Settings**.
12. Select **Set up transaction download**.
13. Enter *Palmetto Citizens FCU* in the **Search** field, select the institution name in the **Results** list and click **Continue**.
14. Enter your Direct Connect **User Id** and **Password** and click **Continue**.
15. If the bank requires extra information, enter it to continue.

NOTE: Select “Direct Connect” for the “Connection Type” if prompted.

16. In the “**Accounts Found**” screen, 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.

17. Select **Finish**.