



# Quicken Direct Connect Update: Essentials & Mac 2015

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## Introduction

As Suncoast Credit Union completes its core processing system upgrade, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your **Suncoast Member Number** and **SunNet PIN**.

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.

**This update is time sensitive and can be completed on or after February 17, 2015.**

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## Procedures

### Task 1: Upgrade 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: Deactivate Your Account(s) at Suncoast Schools FCU

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Remove the checkmark from **I want to download transactions**.
4. Click **Save**.
5. Click **Continue** when asked to confirm this deactivation.
6. Repeat steps 2 – 5 for each account at **Suncoast Schools FCU**.

### Task 3: Reactivate Your Account(s) at Suncoast Credit Union

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Check the box I want to download transactions and click Assist me.
4. Enter **Suncoast Credit Union** in the Search field and click **Continue**.
5. Type your **User Id (Member Number)** and **Password (SunNet PIN)** and click Continue.
6. If the bank requires extra information, enter it to continue.

Select "Direct 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.

Do **NOT** select "**ADD**" under the action column.

8. Repeat step 7 for each additional account you wish to download into Quicken.
9. Click **Continue**.

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**Thank you for making these important changes!**