



RE-LINKING YOUR ADVANTIS
ACCOUNT INTO **QUICKEN**

RE-LINKING YOUR ADVANTIS ACCOUNT INTO QUICKEN

We created this guide to help ensure the smooth transition of your data into Quicken through our new online banking service. The guide will walk you through the steps to modify your Quicken settings by de-activating your account, then re-linking it.

We do not support Direct Connect, only Web Connect and Express Web Connect to Advantis Online Banking. For farther explanation on the difference between Direct Connect, Web Connect and Express Web Connect, please visit Quicken Support site at:

<http://quicken.intuit.com/support/help/bank-download-issues/how-quicken-connects-to-your-bank/GEN83013.html>

Re-link Quicken using one of the guides below:

Using Quicken One-Step Update

Allows you to make your update directly from Quicken

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Using Advantis Online Banking

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Using Quicken's One-Step Update: Mac 2010

Please Note: After October 21st, it will take at least 24 hours and up to three days for Advantis transactions to appear in One-Step Update. This is expected downtime related to updating our online banking service.

Step 1: Prepare for Conversion

1. Backup your data file.
2. Download the latest Quicken Update.

For help with either of these steps, you can use the Help feature within Quicken. Search for Backup Data Files and Check for Updates for instructions.

IMPORTANT: To complete the rest of the steps, you will need your online banking username and password. If you have not logged in since October 21st, please log in first to set up your new online banking password before re-linking your accounts.

Step 2: Deactivate Your Advantis Account(s)

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 through 5 for each account at Advantis.

Step 3: Re-activate Your Advantis Account(s)

1. Select your account under the Accounts list on the left side.
2. Choose Accounts menu, then Update Selected Online Account.
3. Click List menu, then select Advantis.
4. Click Continue. (Note: Select Quicken Connect for the Connection Type if prompted.)
5. Enter your Login Credentials for Advantis.
6. Click Continue.
7. In the Choose your Accounts screen, associate each new account to the appropriate account already listed in Quicken. Under the Action column, select your existing account, and each additional account you wish to download into Quicken Essentials.

IMPORTANT: Do not select "Add" under the action column.

8. Click Continue.

Using Quicken's One-Step Update: Windows 2011-2015

Please Note: After October 21st, it will take at least 24 hours and up to three days for Advantis transactions to appear in One-Step Update. This is expected downtime related to updating our online banking service.

Step 1: Prepare for Conversion

1. Backup your data file.
2. Download the latest Quicken Update.

For help with either of these steps, you can use the Help feature within Quicken. Search for Backing up Data Files and Check for Updates for instructions.

IMPORTANT: To complete the rest of the steps, you will need your online banking username and password. If you have not logged in since October 21st, please log in first to set up your new online banking password before re-linking your accounts.

Step 2: Deactivate Your Advantis Account(s)

1. Choose Tools menu, then Account List.
2. Click the Edit or Edit Details button of the account you want to deactivate.
3. In the Account Details dialog, click on the Online Services tab.
4. Click Deactivate or Remove from One Step Update. Follow the prompts to confirm the deactivation.

Step 3: Re-activate Your Advantis Account(s)

1. Open the account register that you want to enable for online account access.
2. Choose Account Actions menu, then Set Up Online.
3. Enter Advantis Credit Union and click Next.
4. Type your Username and Password then click Connect.

Note: You may be presented with your challenge questions prior to receiving your accounts.

5. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select Link or Exists in Quicken and select the matching accounts in the drop-down menu.

IMPORTANT: Do NOT select NEW or Add in Quicken. If you are presented with accounts you do not want to track in this data file, select Ignore – Don't Download into Quicken.

6. After all accounts have been matched, click Next. You will receive confirmation that your account(s) have been added.
7. Click Done or Finish.

Using Advantis Online Banking: Mac 2010

Step 1: Prepare for Conversion

1. Backup your data file.
2. Download the latest Quicken Update.

For help with either of these steps, you can use the Help feature within Quicken. Search for Backing up Data Files and Check for Updates for instructions.

IMPORTANT: To complete the rest of the steps, you will need your online banking username and password. If you have not logged in since October 21st, please log in first to set up your new online banking password before re-linking your accounts.

Step 2: Deactivate Your Advantis Account(s)

1. Select your account under the “Accounts” list on the left side.
2. Choose Accounts menu, then 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 Advantis.

Step 3: Re-activate Your Advantis Account(s)

1. Select your account under the Accounts list on the left side.
2. Choose Accounts menu, then Update Selected Online Account.
3. Click List menu, then select Advantis.
4. Click Continue.
5. A web browser will open within Quicken. Login and download a Quicken WebConnect file (.qfx).
6. Import Transactions.
7. In the Choose your Accounts screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, select your existing account, and each additional account you wish to download into Quicken Essentials.

IMPORTANT: Do not select “Add” under the action column.

8. Click Continue.

Using Advantis Online Banking: Mac 2006 - 2007

Step 1: Prepare for Conversion

1. Backup your data file.
2. Download the latest Quicken Update.

For help with either of these steps, you can use the Help feature within Quicken. Search for Backing up Data Files and Check for Updates for instructions.

IMPORTANT: To complete the rest of the steps, you will need your online banking username and password. If you have not logged in since October 21st, please log in first to set up your new online banking password before re-linking your accounts.

Step 2: Deactivate Your Advantis Account(s)

1. Choose Lists menu, then Accounts.
2. Select the account that you want to disable and click Edit.
3. In the Download Transactions drop-down list, select Not Enabled. Follow the prompts to confirm the deactivation.
4. Remove the information within the Account Number and Routing Number fields.
5. Click OK to save your edits.
6. Repeat steps 2–5 for each Advantis account.
7. Verify that your account list does not display a blue online circle icon for any accounts at Advantis.

Step 3: Re-activate Your Advantis Account(s)

1. Log in to online banking at Advantisfcu.org.
2. Download and import your transactions to Quicken.
3. Click the Use an existing account radio button.
4. Select the corresponding existing Quicken account in the drop-down list and click OK.
5. Repeat steps 3-4 for all Advantis accounts.
6. Choose Lists menu, then Accounts. Verify that each account at Advantis has a blue online circle indicating that it has been reactivated for online services.

Using Advantis Online Banking: Windows 2011 - 2015

Step 1: Prepare for Conversion

1. Backup your data file.
2. Download the latest Quicken Update.

For help with either of these steps, you can use the Help feature within Quicken. Search for Backing up Data Files and Check for Updates for instructions.

IMPORTANT: To complete the rest of the steps, you will need your online banking username and password. If you have not logged in since October 21st, please log in first to set up your new online banking password before re-linking your accounts.

Step 2: Deactivate Your Advantis Account(s)

1. Choose Tools menu, then Account List.
2. Click the Edit or Edit Details button of the account you want to deactivate.
3. In the Account Details dialog, click on the Online Services tab.
4. Click Deactivate or Remove from One Step Update. Follow the prompts to confirm the deactivation.

Note: The name of the buttons referenced above may vary depending on the services and the version of Quicken you are using.

5. Click on the General or General Information tab. Remove the Account Number.
6. Remove the name of the Financial Institution. Click OK to close the window.
7. Repeat steps 2–6 for each account at Advantis.

Step 3: Re-activate Your Advantis Account(s)

1. Log in to online banking at Advantisfcu.org.
2. Download and import your transactions to Quicken.
3. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select Link to an existing account or Use an Existing Quicken account and select the matching account in the drop-down menu.

IMPORTANT: Do NOT select Create a new account or Create a new Quicken account. 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 2-3 for all of your accounts.

Troubleshooting Tips

Issue: Quicken Connecting to zzz-Advantis Credit Union. To check if you are connected to the correct Financial Institution, please:

1. Choose Tools menu, then Account List.
2. Click the Edit or Edit Details button of the account you want to check.
3. In the Account Details dialog, you will see “Financial Institution”.

If you notice that Quicken is connecting to “zzz-Advantis Credit Union”, please give us a call and we can walk you through the steps to rectify the issue.

Issue: After January 20th, Advantis transactions are not appearing in One-Step Update.

It will take at least 24 hours and possibly up to three days for One-Step Update to show Advantis transactions. This is normal, expected downtime related to updating our website.

Issue: After January 20th, duplicate transactions are appearing after you sync your data.

To avoid this, update your settings in Quicken in the Preferences menu under “Downloaded Transactions.” Choose to no longer automatically add transactions to your register. (This will allow you to review new transactions and select whether or not they should load in your transaction register.)

Issue: After January 20th, new accounts are created after you sync your data

(your account is no longer linking to your existing accounts.)

This can happen if your account was not properly de-activated and then re-activated. Delete your new account, and follow the instructions in this guide, being sure to first de-activate your account.

We do not support Direct connect, only Web Connect and Express WEb Connect to Advantis Online Banking. For further explanation on the difference between Direct Connect, Web Connect, and Express Web Connect, please visit Quicken Support site at:

<http://quicken.intuit.com/support/help/bank-download-issues/how-quicken-connects->