

Quicken Conversion Instructions

This guide will take you through the steps needed to ensure that your Quicken Online software will work with the new Providence Federal Credit Union (PFCU) Online Banking platform. This document contains instructions for both Windows and Mac and all three connectivity types (Direct Connect, Express Web Connect, or Web Connect).

IMPORTANT: Express Web Connect will not be available until 5 business days after the launch of the new Online Banking platform, so please utilize another connectivity type if you need transaction updates during this downtime.

To navigate this document, just click the link below that matches your product connectivity:

Instructions for One-Step Update initiated from within Quicken

[**Quicken Windows Direct Connect and Express Web Connect**](#) - Page 2

[**Quicken Mac Direct Connect and Quicken Connect**](#) - Page 3

Instructions for Downloading a Web Connect file from your Online Banking Site

[**Quicken Windows Web Connect**](#) - Page 4

[**Quicken Mac Web Connect**](#) - Page 5

IMPORTANT: If you currently use Direct Connect in Quicken to initiate Bill Payments, please complete the additional tasks at the link below. If you do not use Direct Connect Bill Pay or you only initiate Bill Payments from within your online banking site, these additional tasks are not required.

[**Quicken Windows Bill Pay**](#) - Page 6

[**Quicken Mac Bill Pay**](#) - Page 7

Quicken Windows Bill Pay

Only complete these tasks if you currently initiate Bill Payments from within Quicken Windows.

Important: These tasks must be completed to avoid possible duplicate payments. If you do not cancel payments scheduled to be paid on or after the 1st Action Date, these payments may still be processed.

Before Tuesday, October 10, 2023:

Cancel Existing Bill Payments.

1. Choose **Tools > Online Center**.
2. Choose your institution from the Financial Institution drop-down list.
3. On the Payments tab, choose an account from which a payment is scheduled in the future.
4. In the payments status list, you will cancel payments for each payee with a status that is scheduled for delivery on a date after the 1st Action Date. To do this, select the first payee and click **Cancel Payment**.
5. Repeat steps 3 & 4 for all payments that are scheduled for delivery after the 1st Action Date.
6. On the toolbar, click **Repeating**.
7. Choose a payment instruction and click **Delete**. Click **Delete** again in the confirmation window.
8. Repeat step 7 for each repeating payment you have with your financial institution.

On or after Friday, October 13, 2023

Note: This section only applies if your institution will support Bill Payments initiated from within Quicken Windows after the system change.

Re-create Your Bill Payments.

If you need help re-creating payments, choose **Help > Quicken Help**. Search for **Create an online Payment** and follow the instructions to create and transmit an online payment.

Quicken Mac Bill Pay

Only complete these tasks if you currently initiate Direct Connect Bill Payments from within Quicken Mac.

Important: These tasks must be completed to avoid possible duplicate payments. If you do not cancel payments scheduled to be paid on or after the 1st Action Date, these payments may still be processed.

Before Tuesday, October 10, 2023:

Cancel Existing Bill Payments.

1. Highlight a Bill Payment transaction on the account register.
2. While on the account register, choose **File > Print** to save your list of pending payments. You can use this when you re-create the bill payments and send these payments again.
3. Click **Edit** at the bottom of the account register window.
4. Click **Edit Details** below the highlighted transaction.
5. Click the Online Payment tab and choose **Cancel Payment**.
6. Repeat these steps for each outstanding Bill Payment you have scheduled with PFCU.

On or after Friday, October 13, 2023:

Note: This section only applies if your institution will support Bill Payments initiated from within Quicken Mac after the system change.

Re-create Your Bill Payments.

For assistance with re-creating payments, choose **Help** and search for **Adding online Bill Pay transactions**. Follow the instructions to create and transmit an online payment.