

Quicken Instructions

L&N Federal Credit Union is completing a required system upgrade. The account aggregate feature will be unavailable Friday, September 29th from 6:00 P.M. (ET) through Monday, October 2nd. We anticipate no connectivity issues for Direct Connect and Web Connect users. Action is required for Express Web connect users.

IMPORTANT: Express Web Connect will not be available until Tuesday, October 10th. Please utilize another connectivity type (Web Connect or Direct Connect) if you need transaction updates during this additional downtime. In addition, Express Web Connect users will need to reconnect their accounts on or after October 10th.

L&N offers three connection methods; Direct Connect, Express Web Connect, or Web Connect. If you are unsure of which method you use, please reference the brief explanation of each below.

- **Direct Connect:** Automatically updates balances and transactions by connecting to L&N Federal Credit Union. Requires unique login credentials. Your password for Direct Connect is not the same as your online banking password.
- **Express Web Connect:** Automatically updates balances and transactions by connecting to L&N Federal Credit Union. This uses the same login credentials as your online banking.
- **Web Connect:** Users manually import balances and transactions by downloading a file from your online banking.

If you encounter issues after the upgrade is completed, please click on the appropriate link below for assistance.

Instructions for One-Step Update initiated from within Quicken

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

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Quicken Windows Direct Connect and Express Web Connect

1. Deactivate online banking connection(s) for accounts connected to L&N Federal Credit Union.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Financial Institution and Account Number information. Click **OK** to close window.
 - g. Repeat steps for any additional accounts that apply.
2. Reconnect the online banking connection for your accounts.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account you want to activate.
 - c. In Account Details, click **Online Services** and then choose **Set up Now**.
 - d. Type L&N Federal Credit Union in the search field and click Next.
 - e. Enter your credentials.
 - Express Web Connect uses the same login credentials as your online banking.
 - Your Direct Connect password is not the same as your online banking password.
 - f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu.

Important: Do NOT choose “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, choose **Ignore – Don’t Download into Quicken** or click **Cancel**.
 - g. After all accounts have been matched, click **Next** and then **Done**.

Quicken Mac Direct Connect and Quicken Connect

Activate online banking connection(s) for accounts connected to L&N Federal Credit Union.

1. Click your account in the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter L&N Federal Credit Union in the search field, select the correct option and click **Continue**.
5. Enter your credentials.
 - Express Web Connect uses the same login credentials as your online banking.
 - Your Direct Connect password is not the same as your online banking password.
6. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under **Action**, choose **Link** to pick your existing account. **Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.**
7. Click **Finish**.

Quicken Windows Web Connect

1. Deactivate online banking connection(s) for accounts connected to L&N Federal Credit Union.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Financial Institution and Account Number information.
 - g. Click **OK** to close window.
 - h. Repeat steps for any additional accounts.
2. Reconnect online banking connection for accounts that apply.
 - a. Download a Quicken Web Connect file from your online banking.
 - b. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
 - c. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
 - d. Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
 - e. Repeat this step for each account you have connected to this institution.

Quicken Mac Web Connect

Activate online banking connection(s) for accounts connected to L&N Federal Credit Union

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter L&N Federal Credit Union in the search field, select the correct option and click **Continue**.
5. Log into your online banking and download your transactions to your computer.
Important: 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 titled **Drop download file**. Choose **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, click **Link** to pick your existing account.
Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.
8. Click **Finish**.