

Quicken Conversion Instructions

Quicken Windows Express Web Connect

On or after April 9, 2025 deactivate online banking connection for accounts connected to Sovita.

1. Choose **Tools > Account List**.
2. Click **Edit** on the account to deactivate.
3. In Account Details, click **Online Services**.
4. Click **Deactivate**. Follow prompts to confirm deactivation.
5. Click the **General** tab.
6. Delete Sovita and your Account Number information. Click **OK** to close window.
7. Repeat steps for any additional accounts that apply.

Reconnect the online banking connection for your accounts.

1. Choose **Tools > Account List**.
2. Click **Edit** on the account you want to activate.
3. In Account Details, click **Online Services** and then choose **Set up Now**.
4. Type Sovita Credit Union in the search field and click **Next**.
5. Enter your Sovita Username and Password. Express Web Connect uses the same credentials you use for Sovita's online banking login.

Important: If your credentials do not work, contact Sovita.

6. 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**.

7. After all accounts have been matched, click **Next** and then **Done**.

Quicken Mac Web Connect

On or after April 9, 2025 activate online banking connection for accounts connected to Sovita.

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Sovita Credit Union in the search field, select the correct option, and click **Continue**.
5. Log into Sovita's online banking site 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**.

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6. Delete Sovita Credit Union and Account Number information.
7. Click **OK** to close window.
8. Repeat steps for any additional accounts.

Reconnect online banking connection for accounts that apply.

1. Download a Quicken Web Connect file from Sovita's online banking site.
2. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
3. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
4. 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.
5. Repeat this step for each account you have connected to Sovita.

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6. After all accounts have been matched, click **Next** and then **Done**.