Quicken Essentials and Quicken Mac 2015 Conversion Instructions

Quicken Essentials and Quicken Mac 2015

Express Web Connect

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Introduction

As ***Credit Union 1*** completes its system conversion to a new home banking system, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your ***[User ID and Password]*** for the ***Credit Union 1*** website.

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.

IMPORTANT: These instructions are divided into **2 PHASES**.

- **PHASE 1 must** be completed **before** ***[4/3/2015]***.
- **PHASE 2 must** be completed **on or after** ***[4/7/2015]***.

PHASE 1: This Phase is time sensitive and **must** be completed **before** ***[4/3/2015]***.

Documentation and Procedures

Task 1: Conversion 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: Connect to Credit Union 1

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Deactivate Your Account(s) At Credit Union 1

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 ***Credit Union 1.***

PHASE 2: The Phase below is time sensitive and can be completed on or after ***[4/7/2015]***.

Task 4: Re-activate Your Account(s) at Credit Union 1 Alaska

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 ***Credit Union 1 Alaska*** in the Search field and click **Continue**.
5. Type your **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

NOTE: Select "Quicken 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.

IMPORTANT: 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**.

Thank you for making these important changes!