Quicken for Mac Conversion Instructions

Quicken for Mac 2006-2007

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 Your Data**," and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for ***Updates***, select "**Checking for Updates to Quicken**," and follow the instructions.

Task 2: Connect to Credit Union 1

1. Choose **Online** menu > **Download Transactions.**
2. Select your account from the drop-down list.
3. Click **Download** to access ***Credit Union 1*** website at ***www.cu1.org.***
4. Enter your **Customer ID** and **PIN** to login to the ***Credit Union 1*** web site. Download your transactions through ***4/6/15*** into Quicken.
5. Repeat the download process for each account you have at ***Credit Union 1*** (such as checking, savings, credit cards and brokerage).
6. Once all accounts have been downloaded, accept all transactions into your Quicken account registers.

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

1. Choose **Lists** menu > **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 account at ***Credit Union 1.***
7. Verify that your account list does not display a blue online circle icon for any accounts 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. Log into the ***Credit Union 1*** website at www.cu1.org. Download and import your transactions to Quicken.
2. Click the **Use an existing account** radio button.
3. Select the corresponding existing Quicken account in the drop-down list and click **OK**.
4. Repeat steps 3-4 for all accounts at ***Credit Union 1.***
5. Choose **Lists** menu > Accounts. Verify that each account at ***Credit Union 1*** has a blue online circle indicating that it has been reactivated for online services.

Thank you for making these important changes!