Quicken for Mac Conversion Instructions

Quicken for Mac 2006/2007

Web Connect

Introduction

As *PremierOne Credit Union* completes its system conversion*,* you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your *User ID and Password* for *eBranch*, PremierOne Credit Union's online banking platform.

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.

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: Deactivate Your Account(s) At *PremierOne Credit Union* on or after *October 27th, 2015*

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 *PremierOne Credit Union*.

7. Verify that your account list does not display a blue online circle icon for any accounts at *PremierOne Credit Union*.

Task 3: Re-activate Your Account(s) at *PremierOne Credit Union* on or after *October 27th, 2015.*

1. Log in to *PremierOne Credit Union* and download your Quicken Web Connect file.

2. Import your transactions to Quicken.

> **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.

3. Ensure you associate the account to the appropriate account already listed in Quicken. Click the **Use an existing account** radio button.

4. Select the corresponding existing Quicken account in the drop-down list and click **OK**.

5. Repeat steps 3-4 for all accounts at *PremierOne Credit Union*.

6. Choose **Lists** menu > Accounts. Verify that each account at *PremierOne Credit Union* has a blue online circle indicating that it has been reactivated for online services.

Thank you for making these important changes!