Quicken for Mac Conversion Instructions

Quicken for Mac 2015

Express 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.

NOTE:	Quicken Web Connect/Express Web Connect accounts use the same User ID and PIN/Password as your login for *eBranch*.

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 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: Deactivate Your PremierOne Credit Union Account(s) on or after *November 3rd, 2015.*

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 *PremierOne Credit Union.*

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

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 *PremierOne Credit Union* in the Search field and click **Continue**.

5. Type your **User Id** and **Password** and click **Continue**.

6. If the credit union 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!