Quicken Essentials for Mac Conversion Instructions

Quicken Essentials for Mac 2010

Web Connect

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Introduction

As ***Financial Plus Credit Union*** completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your login credentials for the ***Financial Plus Credit Union*** 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.

> **NOTE:** This update is time sensitive and can be completed on or after ***August 25th, 2014***.

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 Account(s) At Financial Plus Credit Union

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 ***Financial Plus Credit Union .***

Task 3: Re-activate Your Account(s) at Financial Plus Credit Union

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Click **List** menu > Select ***Financial Plus Credit Union*** .
4. Click **Continue**.

NOTE: Select “Quicken Connect” for the “Connection Type” if prompted.

5. Enter your Login Credentials for ***Financial Plus Credit Union .***
6. Click **Continue**.
7. In the “Choose your Accounts” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select your existing account, and each additional account you wish to download into Quicken Essentials.

IMPORTANT: Do **NOT** select “**ADD**” under the action column.

8. Click **Continue**.

Thank you for making these important changes!