# Quicken for Windows Conversion Instructions 

Quicken for Windows 2012-2014
Web Connect to Express Web Connect

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## I ntroduction

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 $25^{\text {th }}, 2014$.

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

## Task 2: Deactivate Your Account(s) At Financial Plus Credit Union

1. Choose Tools menu > Account List.
2. Click the Edit or Edit Details button of the account you want to deactivate.
3. In the Account Details dialog, click on the Online Services tab.
4. Click Deactivate or Remove from One Step Update. Follow the prompts to confirm the deactivation.

NOTE: The name of the buttons referenced above may vary depending on the services and the version of Quicken you are using.
5. Click on the General or General Information tab. Remove the Account Number.
6. Remove the name of the Financial Institution. Click OK to close the window.
7. Repeat steps 2-6 for each account at Financial Plus Credit Union.

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

1. Open the account register that you want to enable for online account access.
2. Choose Account Actions menu > Set Up Online.
3. Enter Financial Plus Credit Union and click Next.
4. Type your User ID and Password. Click Connect.

NOTE: You may be presented with a security question from your Financial Institution prior to receiving your accounts.
5. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select Link or Exists in Quicken and select the matching accounts in the drop-down menu.

## I MPORTANT: Do NOT select New or Add In Quicken. If you are presented with accounts you do not want to track in this data file, select I gnore - Don't Download into Quicken.

6. After all accounts have been matched, click Next.

You will receive confirmation that your account(s) have been added.
7. Click Done or Finish.

