

Quicken for Windows Conversion Instructions

Quicken for Windows 2011-2013

Direct Connect

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Introduction

As **Fort Sill Federal Credit Union** completes its **Online Banking** 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 **Username and Password** for the **Fort Sill Federal 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 **9/18/2013**.

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Quicken Help**. Search for **Backup Data File** and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Quicken Help**. Search for **Update Software** and follow the instructions.

Task 2: Deactivate Your Account(s) At Fort Sill Federal 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 on **Deactivate** or **Deactivate Online Payment** (only available if you use bill pay services). Follow the prompts to confirm the deactivation.
5. Click **Deactivate** or **Remove from One Step Update**. Follow the prompts to confirm the deactivation.

NOTE: The name of the buttons referenced above vary depending on the services you currently use and the version of Quicken you are using.

6. Click on the **General** or **General Information** tab.
7. Remove **Fort Sill Federal Credit Union's** name. Click **OK** to close the window.
8. Repeat steps 2 – 7 for each account at **Fort Sill Federal Credit Union**.

Task 3: Re-activate Your Account(s) at Fort Sill Federal 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 **Fort Sill FCU** and click **Next**.
4. Type your unique **User ID** and Online Banking **Password**. **You will no longer need to use a separate Direct Connect Password**. Click **Connect**.
5. You will be presented with a list of accounts available for online access.
6. 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.

IMPORTANT: 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 **Ignore – Don't Download into Quicken**.

7. After all accounts have been matched, click **Next**.
You will receive confirmation that your account(s) have been added.
8. **(If duplicate transactions are imported into Quicken, you will want to delete them manually.)**
9. Click **Done** or **Finish**.

Thank you for making these important changes!