

# Quicken Essentials for Mac Conversion Instructions

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*Quicken Essentials for Mac 2010*

*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

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### Task 1: Conversion Preparation

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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.

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### Task 2: Connect to Fort Sill Federal Credit Union

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1. Select your account under the "**Accounts**" list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

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### Task 3: Deactivate Your Account(s) At Fort Sill Federal Credit Union

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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 **Fort Sill Federal Credit Union**.

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**Task 4: Re-activate Your Account(s) at Fort Sill Federal Credit Union**

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1. Select your account under the "**Accounts**" list on the left side.
2. Choose Accounts menu > "Update Selected Online Account".
3. Click "List" > Select **Fort Sill FCU**.
4. Click "**Continue**".

**NOTE:** Select "Direct Connect" for the "Connection Type" if prompted.

5. Enter your **Login Credentials** for **Fort Sill Federal Credit Union's Online Banking website**.
6. In the "Choose your Accounts" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, you will want to select your existing account.

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

7. Repeat step 6 for each additional account you wish to download into Quicken Essentials.
8. Click "**Save**".

***Thank you for making these important changes!***