Quicken for Mac Conversion Instructions

Quicken for Mac 2015

Web Connect

Introduction

As *Energy One FCU* completes its system conversion*,* you will need to modify your QuickBooks settings to ensure the smooth transition of your data. To complete these instructions, you will need your *username and password* for *Online Bank*.

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 Account(s) at *Energy One FCU*

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 *Energy One.*

Task 3: Re-activate Your Account(s) at *Energy One FCU*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Update Selected Online Account**.

3. Enter *Energy One FCU* in the Search field and click **Continue**.

4. Log in to *Online Bank @ www.energyone.org*

5. **Download** a file of your transactions to your computer.

6. Drag and drop the downloaded file into the box **Drop download file**.

> **NOTE:**   Select "Web 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. Click **Continue**.

Thank you for making these important changes!