Quicken for Mac Conversion Instructions

Quicken for Mac 2006-2007

Web Connect

Table of Contents

AUSTIN TELCO
FEDERAL CREDIT UNION

Introduction

As *Austin Telco Federal 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 Username and Password for *Austin Telco FCU* Online Banking.

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 3/10/15.

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 Your Data**," and follow the instructions.

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

Task 2: Deactivate Your Account(s) At Austin Telco FCU

1. Choose **Lists** menu > **Accounts**.

2. Select the account that you want to disable and click **Edit**.

3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.

4. Remove the information within the **Account Number** and **Routing Number** fields.

5. Click **OK** to save your edits.

6. Repeat steps 2 – 5 for each account at *Austin Telco FCU*.

7. Verify that your account list does not display a blue online circle icon for any accounts at *Austin Telco FCU*.

Task 3: Re-activate Your Account(s) at Austin Telco FCU

1. Log into the *Austin Telco FCU* website at www.atfcu.org.

2. Download and import your transactions to Quicken.

3. Click the **Use an existing account** radio button.

4. Select the corresponding existing Quicken account in the drop-down list and click **OK**.

5. Repeat steps 3-4 for all accounts at *Austin Telco FCU*.

6. Choose **Lists** menu > Accounts. Verify that each account at *Austin Telco FCU* has a blue online circle indicating that it has been reactivated for online services.

Thank you for making these important changes!