Quicken for Windows Conversion Instructions

Quicken for Windows 2012–2015

Web Connect

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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**

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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 Your Data* and follow the instructions.

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

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

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1. Choose **Tools** menu > **Account List**.

2. Click the **Edit** button of the account you want to deactivate.

3. In the **Account Details** dialog, click on the **Online Services** tab.

4. Click **Deactivate**. Follow the prompts to confirm the deactivation.

5. Click on the **General** tab.

6. Remove the financial institution name and account number. Click **OK** to close the window.

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

Task 3: **Re-activate Your Account(s) at Austin Telco FCU**
1. Log in to Austin Telco FCU and download your Quicken Web Connect file.

2. Click **File** > **File Import** > **Web Connect File**.

3. If prompted for connectivity type, select **Web Connect**.

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4. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching account in the drop-down menu.

5. Repeat steps 2 – 4 for all of your accounts.

Thank you for making these important changes!