Quicken Essentials for Mac Conversion Instructions

Quicken Essentials for Mac 2010

Web Connect to Direct Connect

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Introduction

As *St. Paul Federal Credit Union* completes its system conversion to our new *eBanking Services,* you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your member ID and PIN for the *St. Paul 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 *07/15/2014 but before 08/20/2014.*

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: Connect to St. Paul Federal Credit Union

1. Log in to *St. Paul Federal Credit Union* web site at www.stpaulfcu.org Download your transactions into Quicken.

2. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Deactivate Your Account(s) with St. Paul Federal Credit Union Internet Banking (Old System)

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 with Internet Banking.

Task 4:   Re-activate Your Account(s) with St. Paul Federal Credit Union eBanking (New System)

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

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

3. Click **List** menu > Select *St. Paul Federal Credit Union- New*

4. Click **Continue**.

5. Select **Direct Connect** for the **Connection Type** if prompted.

6. Enter your Login Credentials for *eBanking*

IMPORTANT:	In the "Choose your Accounts" screen, associate each new account with an existing account in Quicken. Under the **Action** column, you will want to select your existing account. **Do NOT** select "**ADD**" in the **Action** column.

7. Click Save.

Thank you for making these important changes!