Quicken for Mac Conversion Instructions

Quicken for Mac 2005-2007

Web Connect to Direct Connect

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Introduction

As *St. Paul Federal Credit Union* completes its system conversion to our new *eBanking Service,* you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your login credentials 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 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 *Check for Updates*, and follow the instructions.

Task 2: Connect to St. Paul Federal Credit Union

1. Choose **Online** menu > **Download Transactions**

2. Select your account from the drop-down list.

3. Click **Download** to access *St. Paul Federal Credit Union* website at www.stpaulfcu.org*.*

4. Enter your member ID and PIN to login to the *St. Paul Federal Credit Union* web site.

5. Download your transactions through *(TODAYS DATE)* into Quicken.

6. Repeat the download process for each account you have in Internet Banking (such as checking, savings, credit cards and brokerage).

7. After all accounts have been downloaded, accept all transactions into your Quicken account registers.

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

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 in Internet Banking.

7. Verify that your account list does not display a blue online circle icon for any accounts at *St. Paul Federal Credit Union.*

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 **Lists** menu > **Accounts**.

3. Select your first disabled account and click **Edit**.

4. Click the **Financial Institution** drop-down list and select **Change Financial Institution**.

5. Click **Update List**.

6. In the **Financial Institutions** dialog, select *St. Paul Federal Credit Union-New* from the list and click Use.

7. Enter the **Customer ID** and **PIN**. Click **OK**.

8. In the **Add Online Services** dialog, match your first account to the appropriate account number. Click **OK**.

NOTE:	Each account will be displayed below "Use an existing account."

9. Click **OK**.

10. Click **OK** to close the **Edit Register** page.

11. Choose **Lists** menu > **Accounts**. Verify that each account at *St. Paul Federal Credit Union* has a blue online circle indicating that it has been reactivated for online services.

Thank you for making these important changes!