

Quicken for Mac Conversion Instructions



Quicken for Mac 2015

Web Connect

Introduction

As **Modesto's First Fed CU** completes its system conversion to **NetTeller** you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your **NetTeller ID and Password** for the **Modesto's First Fed CU** 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.

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 **Modesto's First Fed CU** for a final download by **August 6, 2015 before 3:00PM**

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. 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) at **Modesto's First Fed CU** on or after **August 7, 2015**

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 **Modesto's First Fed CU**.

Task 4: Re-activate Your Account(s) at **Modesto's First Fed CU** on or after **August 7, 2015**

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Enter **Modesto's First Fed. CU** in the Search field and click **Continue**.
4. Log in to www.m1fcu.org
5. **Download** a file of your transactions to your computer.

IMPORTANT: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

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!