



## QUICKEN CONVERSION STEPS

Quicken for Windows 2012-2014 & Express Web Connect

### For those of you that use Quicken's One-Step Update service to download transactions

If you use the One-Step Update service to download your Firelands Federal CU account transactions into Quicken, there are changes you will have to make within Quicken to continue using this service on the new Home Banking system.

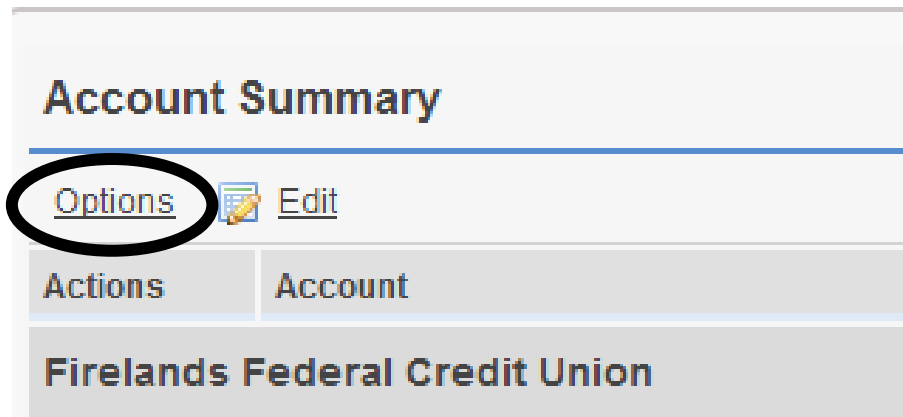
Listed below are links to instructions for both the Windows and Apple versions of Quicken. Click on the link for details on what to do to get your transactions to download from the new Online Banking system.

[Quicken for Windows](#)

[Quicken for Apple](#)

### For those of you that manually import a transaction file from Home Banking into Quicken

Once you have logged in to the new Online Banking system, click the 'Options' link in the upper left corner of the window (circled below).



This will bring up a dropdown menu of options, one of which is "Download to Quicken QFX" (arrowed below).



## Quicken (version 2010 and newer) for Windows

1. Backup your Quicken data file. For instructions on how to back up your data file, follow this menu path in Quicken: **Help -> Quicken Help**. From there, search for **Backup Data File** and follow the instructions.
2. Download the latest Quicken Update. For instructions on how to download an update, follow this menu path in Quicken: **Help -> Quicken Help**. From there search for **Update Software** and follow the instructions.
3. Deactivate your account(s) at Firelands Federal CU
  - a. In Quicken, follow this menu path: **Tools -> Account List**
  - b. Click the **Edit** or **Edit Details** button of the Firelands Federal CU account to deactivate.
  - c. In the **Account Details** window that appears, click the **Online Services** tab.
  - d. Click the **Deactivate** or **Remove from One Step Update**. Follow the prompts to confirm the deactivation.
  - e. In the **Account Details** window, click the **General** or **General Information** tab. Remove the values in the **Financial Institution** and **Account Number** fields. Click **OK** to close the window.
  - f. Repeat steps 3b – 3e for each account at Firelands Federal CU that you have in Quicken.

**\*\* NOTE:** *The names of the buttons/tabs referenced above in Step 3 may vary depending on the Quicken services you currently use and the version of Quicken you are using.*

4. Re-activate your account(s) at Firelands Federal CU
  - a. Open the transaction history/register of the account you want to enable for online account access.
  - b. Click the **Account Actions** button and select **Set Up Online**
  - c. Enter **Firelands Federal Credit Union** (if prompted)
  - d. Enter in your username and password that you created during enrollment in our new Home Banking system. Click **Connect**.

**\*\*NOTE:** *You may be presented with a screen(s) prompting you to enter in a security image during the Connect process.*

- e. Ensure you associate the account(s) Quicken finds during the Connect process to the appropriate account already listed in Quicken. You will want to select the **Link** or **Exists in Quicken** option in a drop-down menu.
- f. After all applicable accounts have been set to **Link** or **Exists in Quicken**, click **Next**. You will see a confirmation message that your account(s) has been added.

**\*\*NOTE:** *You may be presented with a screen(s) prompting you to enter in a security image during the Connect process.*

*Do **NOT** select **New** or **Add In Quicken**. If you are presented with accounts that you do not want track in Quicken, select **Ignore – Don't Download into Quicken** for those particular accounts.*

- g. Click **Done** or **Finish**.

**\*\* NOTE:** *The names of the buttons/tabs referenced above in Step 4 may vary depending on the Quicken services you currently use and the version of Quicken you are using.*

### Quicken (version 2010 and newer) for Apple

1. Backup your Quicken data file. For instructions on how to back up your data file, follow this menu path in Quicken: **Help -> Quicken Help**. From there, search for **Backup Data File** and follow the instructions.
2. Download the latest Quicken Update. For instructions on how to download an update, follow this menu path in Quicken: **Help -> Quicken Help**. From there search for **Update Software** and follow the instructions.
3. Deactivate your account(s) at Firelands Federal CU
  - a. Select your account under the **Accounts** list on the left side.
  - b. Click the **Accounts** menu and select **Settings**.
  - c. Remove the checkmark next to **I want to download transactions** and click **Save**.
  - d. Click **Continue** when asked to confirm the deactivation.
  - e. Repeat steps 3b – 3d for each account at Firelands Federal CU that you have in Quicken.
4. Re-activate your account(s) at Firelands Federal CU
  - a. Select your account under the **Accounts** list on the left side.
  - b. Click the **Accounts** menu and select **Update Selected Online Account**.
  - c. Click the **List** menu and select **Firelands Federal Credit Union**.
  - d. Click **Continue**.

**\*\*NOTE:** *If prompted, select **Quicken Connect** for the Connection Type.*

- e. Enter in your username and password that you created during enrollment in our new Home Banking system. Click **Continue**.
- f. In the **Choose Your Accounts** window, ensure you associate the account(s) Quicken finds during the Quicken Connect process to the appropriate account already listed in Quicken. In the **Action** column, select your existing account(s) and any additional accounts you wish to download into Quicken Essentials
- g. Click **Continue**.

**\*\*NOTE:** *Do **NOT** select **Add** in the Action column.*