

# Quicken for Mac Conversion Instructions

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*Quicken for Mac 2006-2007*

*Web Connect*

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## Introduction

As *Georgia's Own Credit Union* completes its system conversion to *a new online banking system*, 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 *old online banking system* and *new online banking system*.

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 *September 9, 2013*.

## Documentation and Procedures

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### 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*, 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 "**Checking for Updates to Quicken**," and follow the instructions.

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### Task 2: Deactivate Your Account(s) in Quicken

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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 at *Georgia's Own*.
7. Verify that your account list does not display a blue online circle icon for any accounts at *Georgia's Own*.

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### Task 3: Convert to Upgraded Online Banking *on/after 9/9/13*

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1. Visit *georgiasown.org*.

2. Enter your existing username (typically your account number) in the **Username** field.
1. Supply your existing password.
2. Change your password, choose 5 security question/answer pairs, and confidence image/image secret pair.

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**Task 4: Re-activate Your Account(s) in Quicken *on/after 9/9/13***

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1. Log into *the new online banking* website at [georgiasown.org](http://georgiasown.org).
2. Select an account to download transaction history (either from the Dashboard or choose one after choosing the "Accounts" widget).
3. Using the "Show Search" box in the "Transactions" bar, select the date range you want to export and choose "Search."
4. Using the "Export" button, download a QFX file and choose "Open" and make sure your Quicken product is selected.

**NOTE:** You might need to allow pop-ups in order to see the download prompt.

5. Click the **Use an existing account** radio button.
6. Select the corresponding existing Quicken account in the drop-down list and click **OK**.
7. Repeat steps 3-4 for all accounts at *Georgia's Own*.
8. Choose **Lists** menu > Accounts. Verify that each account at *Georgia's Own* has a blue online circle indicating that it has been reactivated for online services.

Or – For Express Web Connect (One Step Update)

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**Task 5: Re-activate Your Account(s) at Georgia's Own on/after 9/9/13**

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1. Log into the *new online banking* website at [georgiasown.org](http://georgiasown.org).
2. Select an account to download transaction history (either from the Dashboard or choose one after choosing the "Accounts" widget).
3. Using the "Show Search" box in the "Transactions" bar, select the date range you want to export and choose "Search."
4. Using the "Export" button, download a QFX file and choose "Open" and make sure your Quicken product is selected.

**NOTE:** You might need to allow pop-ups in order to see the download prompt.

5. Click the **Use an existing account** radio button.
6. Select the corresponding existing Quicken account in the drop-down list and click **OK**.
7. Repeat steps 3-4 for all accounts at *Georgia's Own*.
8. Choose **Lists** menu > Accounts. Verify that each account at *Georgia's Own* has a blue online circle indicating that it has been reactivated for online services.

*Thank you for making these important changes!*