Quicken for Windows Conversion Instructions

Quicken for Windows 2011–2013

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

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 Your Data* and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for *Checking for Updates to Quicken* and follow the instructions.

Task 2: Deactivate Your Account(s) in Quicken

1. Choose **Tools** menu > **Account List**.

2. Click the **Edit** or **Edit Details** button of the account you want to deactivate.

3. In the **Account Details** dialog, click on the **Online Services** tab.

NOTE:	The name of the buttons referenced above may vary depending on the services and the version of Quicken you are using.

4. Click on the **General** or **General Information** tab. Remove the **Account Number**.

5. Remove *Georgia's Own Credit Union*. Click **OK** to close the window.

6. Repeat steps 2–6 for each account at *Georgia's Own.*

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

1. Visit *georgiasown.org*.

2. Enter your existing username (typically your account number) in the **Username** field.

3. Supply your existing password.

4. Change your password, choose 5 security question/answer pairs, and confidence image/image secret pair.

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

1. Log in to *the new online banking* web site at *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. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link** to an existing account or **Use an Existing** Quicken account and select the matching account in the drop-down menu.

IMPORTANT:	Do **NOT** select **Create a new account** or **Create a new Quicken account**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.

6. Repeat steps 2 – 5 for all of your accounts

Thank you for making these important changes!