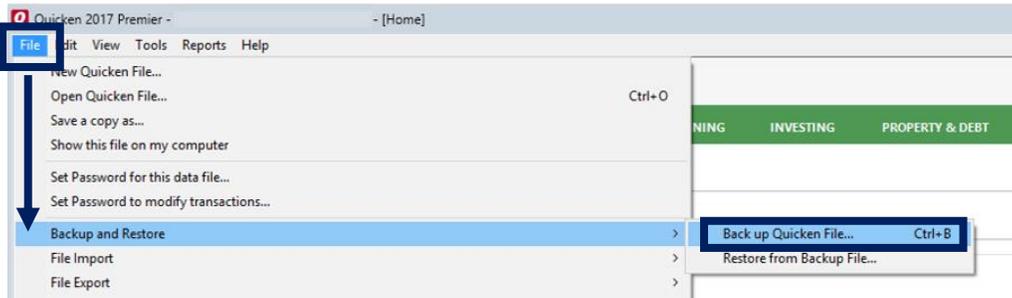


Quicken Conversion Instructions

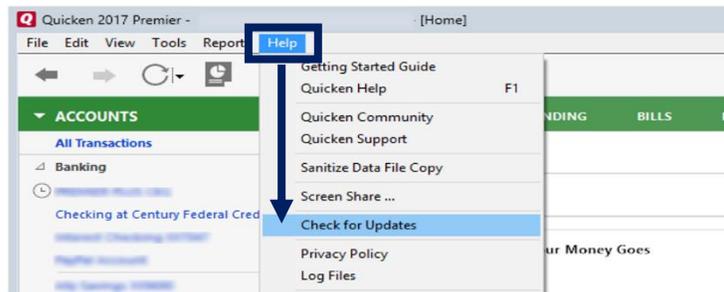
Note: Screens from Windows Quicken 2017

Task 1: Conversion Preparation (before 4/14/2019)

1. Backup your data file.

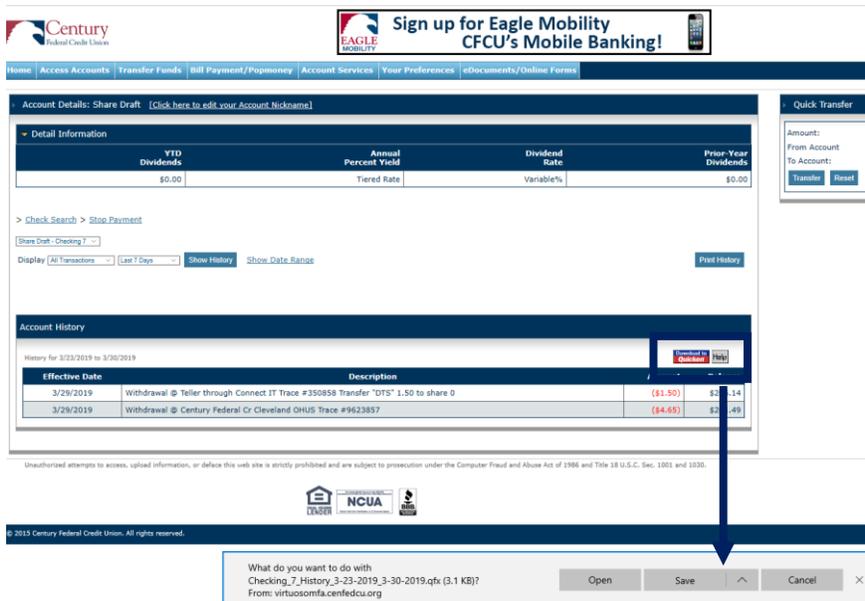


2. Download the latest Quicken Update.



Task 2: Connect for a final download.

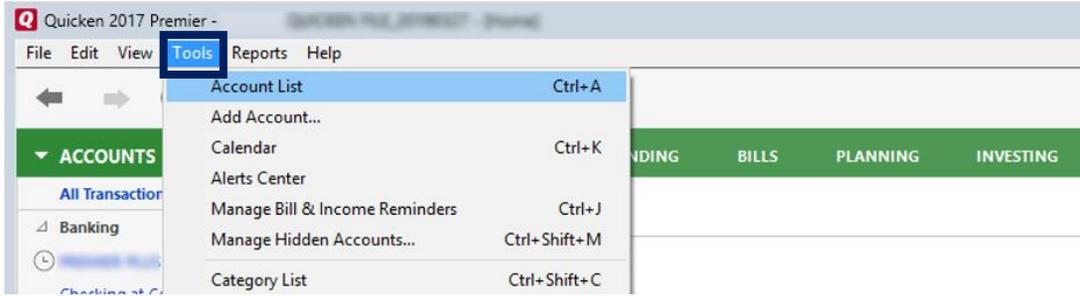
1. Download your Quicken Web Connect file.



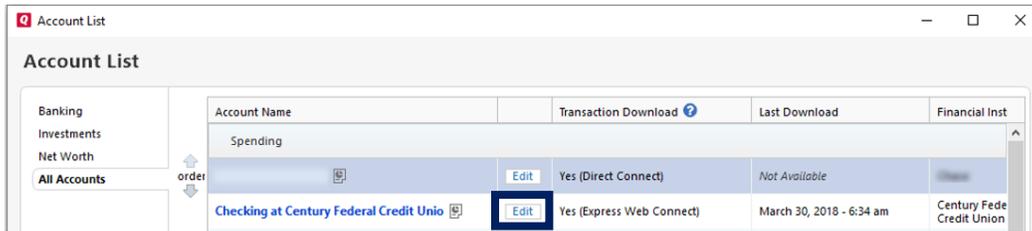
2. Click File → File Import → Web Connect File. Locate and select the Web Connect file to import.
3. Repeat this step for each account that you use for online banking.

Task 3: Disconnect Accounts (on or after 4/17/2019).

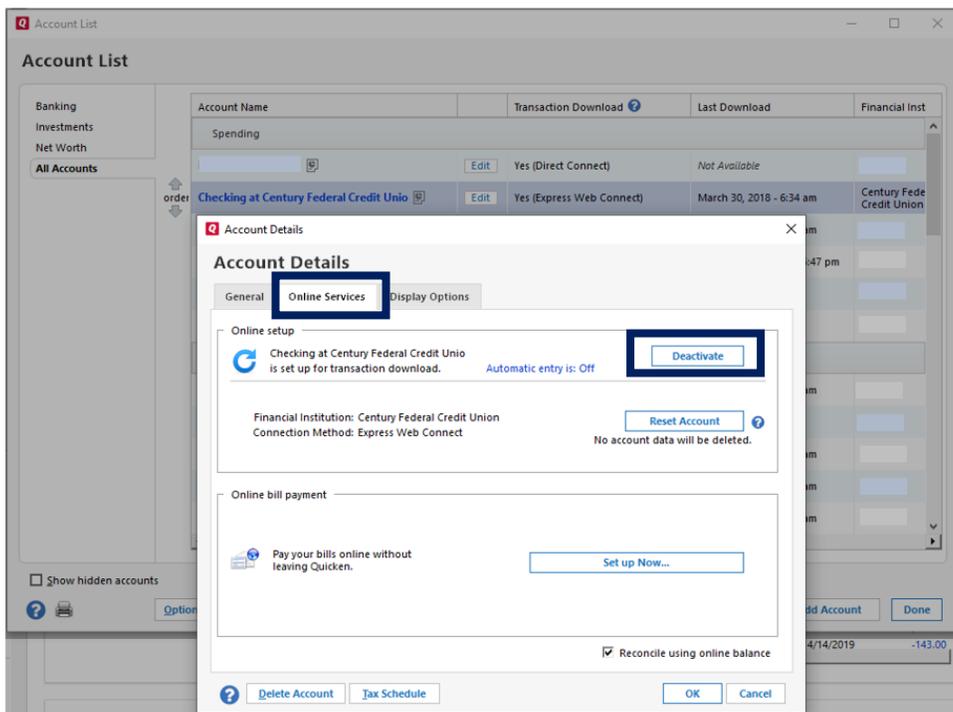
1. Choose Tools menu → Account List



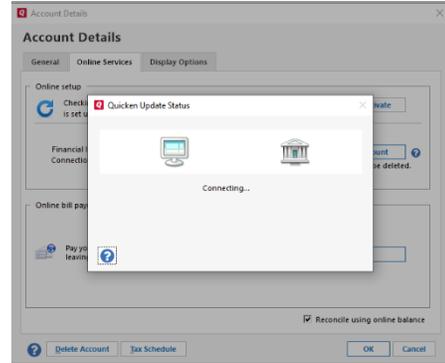
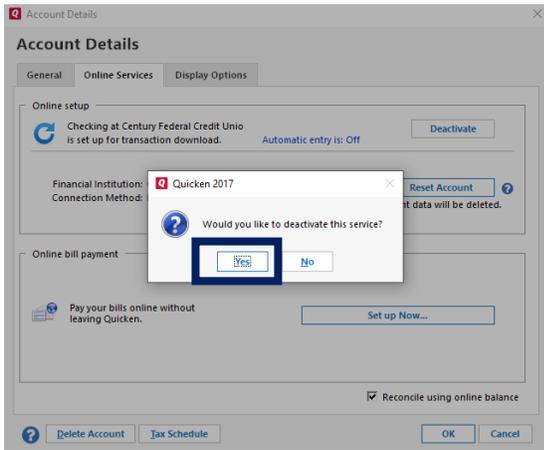
2. Click the Edit button of the account you want to deactivate.



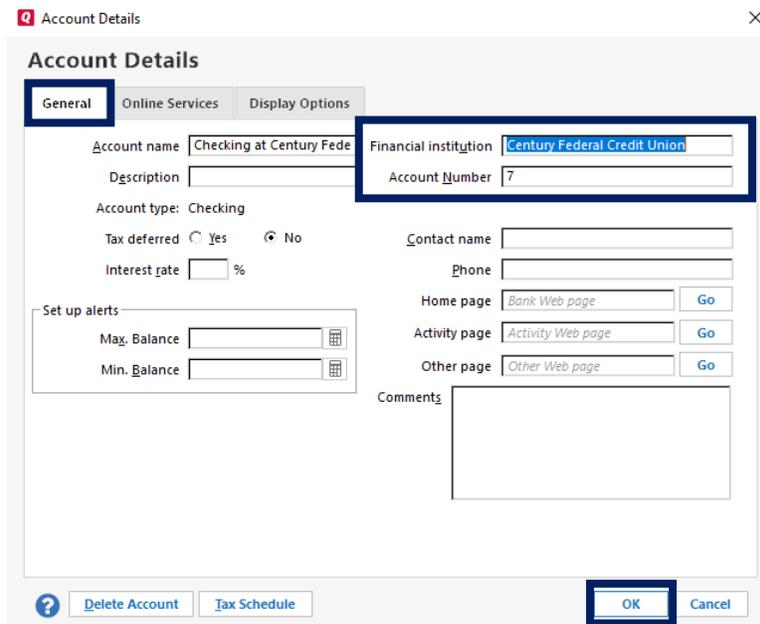
3. In the Account Details dialog, click on the Online Services tab.
4. Click Deactivate.



4. Continued. Follow the prompts to confirm the deactivation.



5. Click on the General tab.

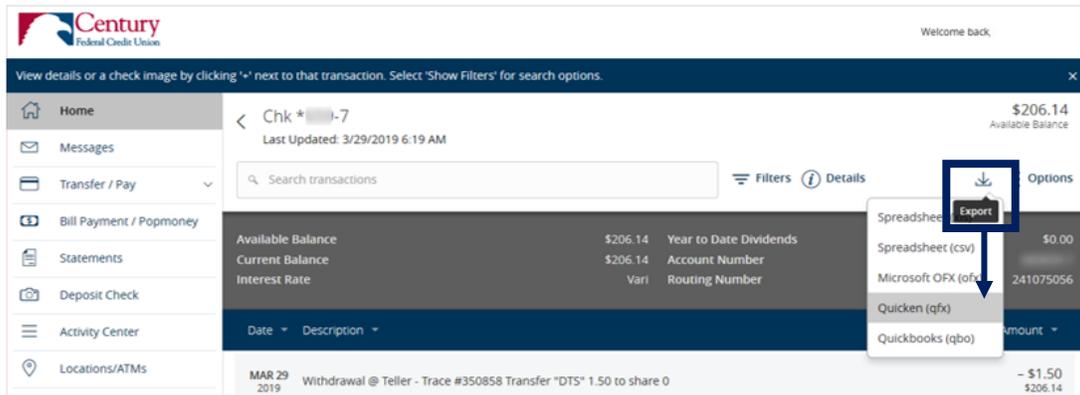


6. Remove the Financial Institution name and account number. (Note: the Financial Institution information will remain grayed out until the deactivation is completed) Click OK to close the window.

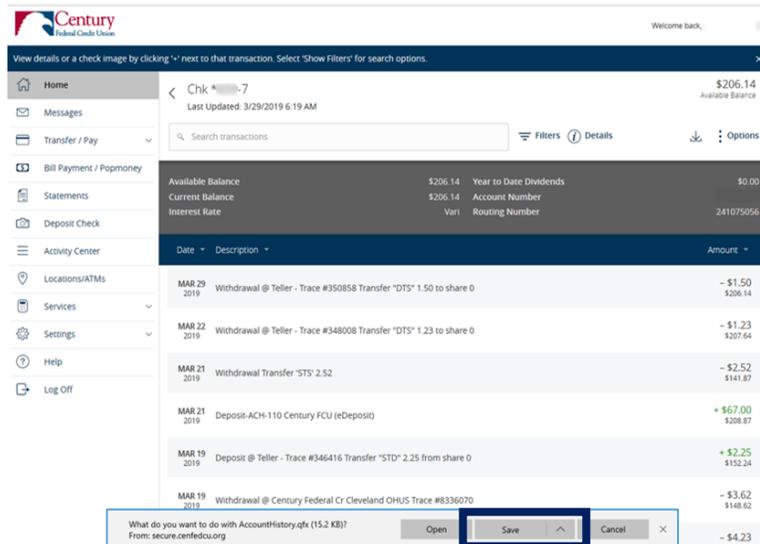
7. Repeat steps for each account to be disconnected.

Task 4: Reconnect Accounts to Century Federal Credit Union (on or after 4/17/2019).

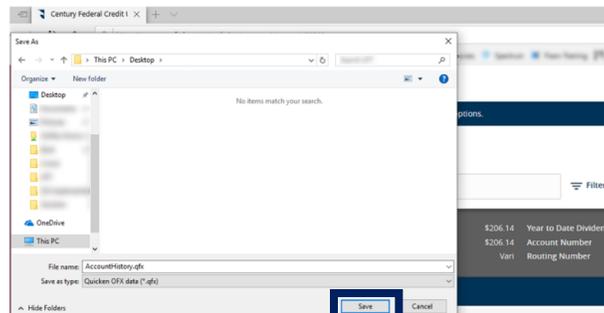
1. Download your Quicken Web Connect file from Online Banking.



a. Click on Save as to select the save location on your computer.

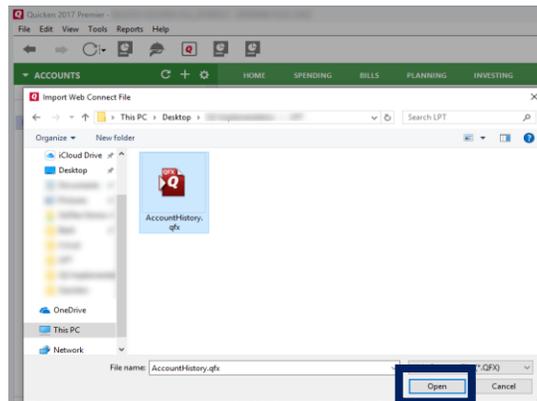
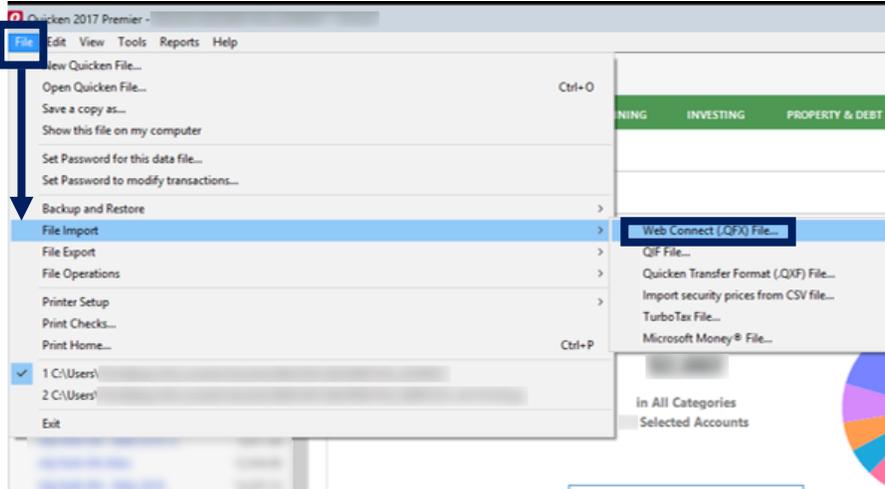


b. Select the location and click save.

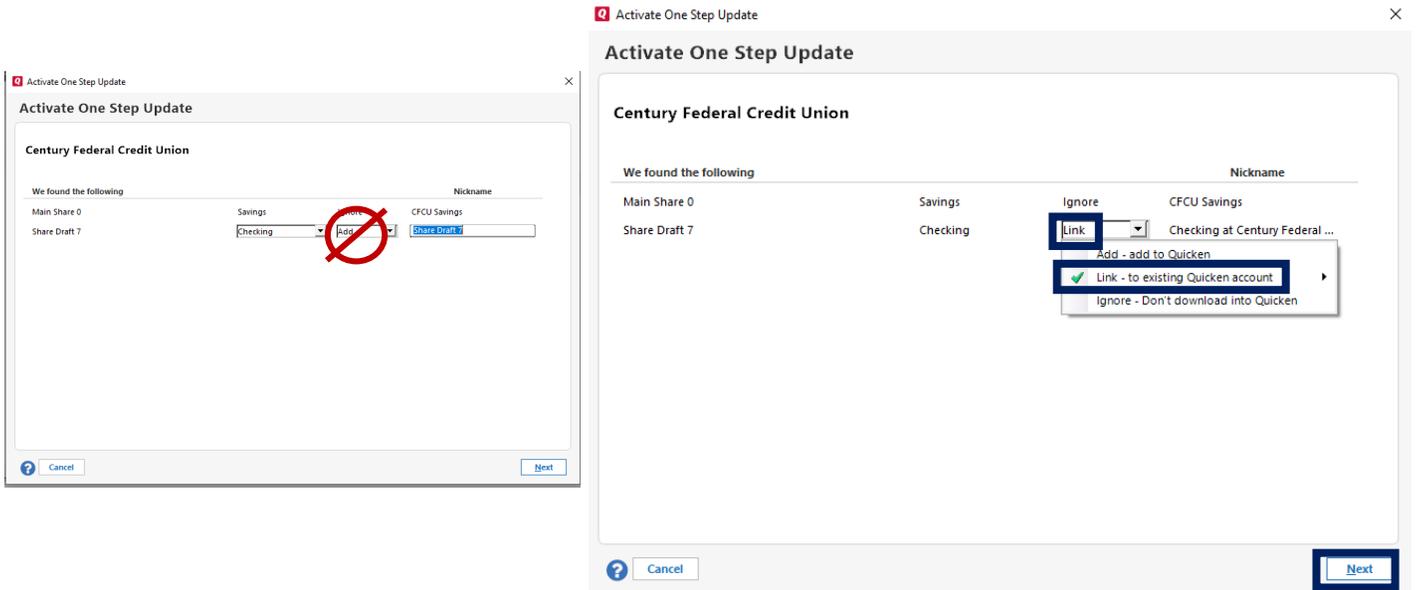


2. Click File → File Import → Web Connect File. Locate and select the Web Connect File to import.

NOTE: Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.



3. Import Downloaded Transactions window opens. Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct count listed in Quicken.



IMPORTANT: Do **NOT** select **Create a new account** unless you intend to add a new account to Quicken. 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.

4. Repeat steps for each account to be reconnected.