

# Quicken for Mac Conversion Instructions

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## *Quicken for Mac 2005-2007*

### *Direct Connect*

As **Franklin First FCU** completes its internet banking enhancements, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your **[User ID and Password]** for the **Franklin First FCU** 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.

**NOTE:** This update is time sensitive and can be completed on or after **2/24/2015**.

## 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 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.

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### **Task 2: Deactivate Your Account(s) At Franklin First FCU**

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1. Choose **Lists** menu > **Accounts**.
2. Select the account that you want to disable and click **Edit**.
3. Write down your account information (account number, routing number, and customer ID).

**NOTE:** You will need this information to re-enable your account.

4. If you use online payment services, then select **Not Enabled** in the **Pay Bills Online** drop-down list. Follow the prompts to confirm the deactivation.

5. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
6. Remove the information within the **Account Number** and **Routing Number** fields.
7. Click **OK** to save your edits.
8. Repeat steps 2 – 7 for each account at **Franklin First FCU**.
9. Verify that your account list does not display a blue online circle icon for any accounts at **Franklin First FCU**.

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**Task 3: Re-activate Your Account(s) at Franklin First FCU - New**

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1. Choose **Lists** menu > **Accounts**.
2. Select your first disabled account and click **Edit**.
3. Click the **Financial Institution** drop-down list and select **Change Financial Institution**.
4. Click on **Update List**.
5. In the **Financial Institutions** dialog, select **Franklin First FCU - New** from the list and click **Use**.
6. Enter the **Customer ID** and **PIN**. Click **OK**.
7. In the **Add Online Services** dialog, match your first account to the appropriate account number. Click **OK**.

**NOTE:** Each account will be displayed below **"Use an existing account."**

8. Click **OK**.
9. Click OK to close the **Edit Register** page.
10. Choose **Lists** menu > **Accounts**. Verify that each account at **Franklin First FCU - New** has a blue online circle indicating that it has been reactivated for online services.

***Thank you for making these important changes!***