intuit. Financial Services

Quicken Essentials for Mac Conversion Instructions

Quicken Essentials for Mac 2010

Direct Connect to Express Web Connect

Table of Contents

TABLE OF CONTENTS **1**

INTRODUCTION **2**

DOCUMENTATION AND PROCEDURES **2**

Task 1: Conversion Preparation 2
Task 2: Connect to Indiana Members Credit Union 2
Task 3: Deactivate Your Account(s) At Indiana Members Credit Union 2
Task 4: Re-activate Your Account(s) At Indiana Members CU 3

INDIANA Members Credit Union
Keeping It Simple

Introduction

As **Indiana Members Credit Union** completes its 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 Indiana Members Credit Union's online banking solution, NetTeller.

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 3/3/2014.

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***, click "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" and select "Check for Updates..." and follow the instructions.

Task 2: Connect to Indiana Members Credit Union

1. Select your account under the "Accounts" list on the left side.
2. Choose **Accounts** menu > Select "Update Selected Online Account"
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Deactivate Your Account(s) At Indiana Members Credit Union

1. Select your account under the "Accounts" list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Remove the checkmark from "**I want to download transactions**".
4. Click **Save**.

NOTE:	Repeat steps 2-4 for each account at **Indiana Members Credit Union**

Task 4: Re-activate Your Account(s) At Indiana Members CU

1. Select your account under the "**Accounts**" list on the left side.
2. Choose **Accounts** menu > Select "**Update Selected Online Account**".
3. Choose **List** menu > Select **Indiana Members CU**
4. Click "**Continue**".

NOTE:	Select "Quicken Connect" for the **Connection Type** if prompted.

5. Click **Save**.
6. Enter your "Login Credentials" for Indiana Members Credit Union's online banking solution, NetTeller at imcu.org.
7. Click "Continue".

In the "Choose your Accounts" screen, ensure you associate each new account to the appropriate account already listed in Quicken.

8. Under the **Action** column, select each account you wish to download into Quicken Essentials.

NOTE:	DO NOT select "ADD" under the action column.

9. Click "**Continue**".

Thank you for making these important changes!