# Quicken for Windows Conversion Instructions

*Quicken for Windows 2011-2014*

*Direct Connect to Express Web Connect*

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**INDIANA Members Credit Union**
*Keeping It Simple*

# Introduction

As **Indiana Members Credit Union** completes its system conversion, 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.

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| **NOTE:** | This update is time sensitive and can be completed on or after 3/3/2014. |

This detour symbol indicates section instructions that are using bill pay in Quicken only. If you do not use Quicken to make online bill payments, you can skip these sections or steps.

## Documentation and Procedures

### Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Quicken Help**. Search for *Backup Data File* and follow the instructions.

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

### Task 2: Cancel Outstanding Payments

If you are not a bill pay user in Quicken, you can skip this section.

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| **IMPORTANT:** | This step must be completed by 3/3/2014 to avoid possible duplicate payment. If you do not cancel payments scheduled to be paid after 3/3/2014, then it is possible that these payments will still be processed. |

1. Choose **Tools** menu > **Online Center**.

2. Select **Indiana Members Credit Union** from the **Financial Institution** drop-down list.

3. On the **Payments** tab, select an account from which a payment is scheduled in the future.

| NOTE: | Click **Print** to save your list of pending payments. You can use this when you recreate and send these payments later. |
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4. In the payment status list, you will cancel payments for each payee with a status that is schedule for delivery on a date after 3/3/2014. To do this, select the first payee and click **Cancel Payment**.

5. Perform steps 3 & 4 for all payments scheduled for delivery on a date after 3/3/2014.

6. On the toolbar, choose **Repeating**.

7. Select a payment instruction and click **Delete**. You will need to click **Delete** again in a confirmation window.

8. Repeat step 7 for each repeating payment instruction you have with your financial institution.

## Task 3: Connect to Indiana Members Credit Union

1. Choose **Tools** menu > **One Step Update**.

2. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.

3. In the **One Step Update Settings** dialog, make sure all items are checked and click **Update Now**.

4. If new transactions display in the **Online Update Summary**, accept them in your Quicken account register.

## Task 4: Deactivate Your Account(s) At Indiana Members Credit Union

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.

4. Click on **Deactivate** or **Deactivate Online Payment** (only available if you use bill pay services). Follow the prompts to confirm the deactivation.

5. Click **Deactivate** or **Remove from One Step Update**. Follow the prompts to confirm the deactivation.

| NOTE: | The name of the buttons referenced above may vary depending on the services you currently use and the version of Quicken you are using. |
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6. Click on the **General** or **General Information** tab. Remove the **Account Number**.

7. Remove the name of the **Financial Institution**. Click **OK** to close the window.

8. Repeat steps 2 – 7 for each account at **Indiana Members Credit Union.**

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**Task 5:   Re-activate Your Account(s) at Indiana Members CU**

1. Open the account register that you want to enable for online account access.

2. Choose **Account Actions** menu > **Set Up Online**.

3. Enter **Indiana Members CU** and click **Next**.

4. Type your **User ID** and **Password**. Click **Connect**.

| NOTE: | You may be presented with a security question from your Financial Institution prior to receiving your accounts. |
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5. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link** or **Exists in Quicken** and select the matching accounts in the drop-down menu.

| IMPORTANT: | Do **NOT** select **New** or **Add In Quicken**.  If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**. |
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6. After all accounts have been matched, click **Next**.

   You will receive confirmation that your account(s) have been added.

7. Click **Done** or **Finish**.

*Thank you for making these important changes!*