

Online Banking Direct Connect Conversion Quicken Windows 2009-2011

As your financial institution completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data.

If you have not yet re-enrolled in Online Banking, please do so before updating Quicken. You will need your new Online Banking user ID and Password to complete this Quicken update.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your Quicken service may stop functioning properly. This conversion should take 15–30 minutes.

1. BACK UP YOUR CURRENT DATA

1. Choose File menu → Backup.
2. Specify which file to back up and where you want the backup saved in the Quicken Backup dialog, and then click OK.

2. DOWNLOAD THE LATEST QUICKEN UPDATE



1. Click the Update icon on the Quicken toolbar.
2. Uncheck all of the boxes and select Update Now in the One Step Update Settings dialog.
3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.
4. When the update is completed, please close and re-open Quicken.



Important Note: BFSFCU's Financial Institution ID has changed in Quicken from **Bank-Fund Staff FCU** to **Bank-Fund Staff FCU New**. You must download

the latest Quicken update in order see the new Institution ID. Updates are only available to registered Quicken users.

3. CREATE A NEW QUICKEN FILE (NEW USERS)



Important Note: This step is for New Quicken Users only. Members who have been using Quicken prior to our system upgrade should skip this step and proceed to Step 4 below.

1. Choose File → New Quicken File
2. Enter a name for your new file and save it.

4. ADD YOUR BFSFCU ACCOUNTS



Important Note: As a result of our system upgrade, your account numbers have changed. You will need to add your new BFSFCU accounts to Quicken in order to download transactions from the beginning of April 2011 to the present.

1. Choose Tools → Add Account...
2. Checking should be selected by default. If not, please select Checking.
3. You will be asked to enter the name of your bank. Please use **Bank-Fund Staff FCU New**.

(Note that Bank-Fund Staff FCU is no longer active.)

5. ENTER YOUR CREDENTIALS & UPDATE

1. Enter your Online Banking User ID, which you created during re-enrollment.
2. Enter your Online Banking password.
3. Quicken should find all of your BFSFCU accounts, except credit cards. **(For instructions on importing your BFSCU credit card account history, please see Step 6 below.)**

4. Once your accounts have successfully loaded, you may use Tools → One Step Update to download your transactions. You may be prompted to enter your Online Banking password again.



Important Note: Because your account numbers and our Institution ID have changed, a successful import of your account history will result in duplicate accounts. BFSFCU recommends that you delete your old accounts. Should you need to view transaction history prior to April, 2011, you may use the backup created in Step 1.

6. IMPORTING CREDIT CARD HISTORY



Important Note: Credit card transaction history is not automatically imported via the steps above; however, you may manually add your credit card transactions to Quicken on a monthly basis using the following steps.

1. Open Quicken.
2. Open a web browser, and login to Online Banking.
3. Select Accounts → Download.
4. Select the credit card you wish to import under the Account drop-down box.
5. Select the statement period you wish to import (**BFSFCU recommends importing your statement data in chronological order, from oldest to newest, one at a time.**)
6. Select the **.QFX** download type.
7. Click download. When prompted, click Open. Quicken should recognize the file format and begin downloading your transaction data.
8. Repeat Steps 4-7 for each statement period you wish to import.

**CONGRATULATIONS! YOUR QUICKEN UPDATE
IS COMPLETE!**