First Northern Credit Union

Quicken for Mac 2007 Conversion Instructions

Web Connect

Introduction

As ***First Northern Credit Union*** completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

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***, select "**Backing Up Your Data**," and follow the instructions.

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

Task 2: Connect to ***First Northern Credit Union*** for a final download before ***3:00 PM CST***

1. Choose **Online** menu > **Download Transactions.**
2. Select your account from the drop-down list.
3. Click **Download** to access ***www.fncu.org***.
4. Enter your **User ID** and **Password** to login to the website. Download your transactions through ***September 28, 2018*** into Quicken.
5. Repeat the download process for each account you have (such as checking, savings, credit cards and brokerage).
6. Once all accounts have been downloaded, accept all transactions into your Quicken account registers.

Task 3: Disconnect Accounts at ***First Northern Credit Union*** on or after ***October 2, 2018***

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1. Choose **Lists** menu > **Accounts**.
2. Select the account to deactivate and click **Edit**.
3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
4. Remove the information within the **Account Number** and **Routing Number** fields.
5. Click **OK** to save your edits.
6. Repeat steps 2 – 5 for each account to be disconnected.
7. Verify your account list does not display a blue online circle icon for the accounts you are disconnecting.

Task 4: Connect Accounts at ***First Northern Credit Union*** on or after ***October 2, 2018***.

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1. Download your Quicken Web Connect file from ***www.fncu.org***.

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

2. Import your transactions to Quicken.
3. Associate the account to the appropriate account already listed in Quicken. Select **Use an existing account**.
4. Match the transactions you are importing to the corresponding existing Quicken account in the drop-down list and click **OK**.
5. Repeat steps for each account to be reconnected.
6. Choose **Lists** menu > Accounts. Verify each account at ***First Northern Credit Union*** has a blue online circle indicating it has been reactivated for online services.