Quicken for Windows Conversion Instructions

Quicken for Windows 2010–2013

Direct Connect to Web Connect

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Introduction

As ***Denver Community Credit Union*** completes its system upgrades, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your customer ID and PIN for the ***Denver Community Credit Union*** website at ***www.denvercommunity.coop.***

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 ***1/23/2013***

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: Connect to Denver Community 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 3: Deactivate Your Account(s) At Denver Community 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 vary depending on the services you currently use and the version of Quicken you are using.

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 ***Denver Community Credit Union.***

Task 4: Re-activate Your Account(s) at Denver Community Credit Union

1. Log in to ***Denver Community Credit Union*** web site at ***www.denvercommunity.coop.***
2. Download your transactions to Quicken.
3. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** or **Use an existing Quicken account** and select the matching account in the drop-down menu.

IMPORTANT:	DO NOT select **Create a new account** or **Create a new Quicken account**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.

4. Repeat steps 2 – 3 for all of your accounts.

Thank you for making these important changes!