# Quicken for Windows Conversion Instructions

Quicken for Windows 2010-2013

Web Connect

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### Introduction

As *Denver Community Credit Union* completes its system upgrade, 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 *Denver Community Credit Union's* website: *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.

#### **Documentation and Procedures**

#### Task 1: Conversion Preparation

- Backup your data file. For instructions to back up your data file, choose Help menu > Search. Search for 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 *Checking for Updates to Quicken* and follow the instructions.

#### Task 2: Connect to Denver Community Credit Union

- Log in to *Denver Community Credit Union* web site at www.denvercommunity.coop. Download your transactions into Quicken.
- 4. Once the transactions are downloaded, accept all transactions into your Quicken account register.
- 5. 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 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 **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 and the version of Quicken you are using.

- Click on the General or General Information tab. Remove the Account Number.
- 6. Remove the name of the Financial Institution. Click OK to close the window.
- 7. Repeat steps 2–6 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's* 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!