Quicken for Mac Conversion Instructions

Quicken for Mac 2005-2007

Web Connect

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Introduction

As Arrowhead Credit Union completes its online banking 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 account number and password for the Arrowhead Credit Union website.

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

NOTE:	This update is time sensitive and can be completed on or after 7/09/2013.

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: Deactivate Your Account(s) At Arrowhead Credit Union

1. Choose **Lists** menu > **Accounts**.

2. Select the account that you want to disable 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 Arrowhead Credit Union account.

7. Verify that your account list does not display a blue online circle icon for any Arrowhead Credit Union accounts.

Task 3: Re-activate Your Account(s) at Arrowhead Credit Union

1. Log into the Arrowhead Credit Union website at www.arrowheadcu.org.

2. Download your transactions to Quicken.

3. Click the **Use an existing account** radio button.

4. Select the corresponding existing Quicken account in the drop-down list and click **OK**.

5. Repeat steps 3-4 for all Arrowhead Credit Union accounts.

6. Choose **Lists** menu > Accounts. Verify that each Arrowhead Credit Union account has a blue online circle indicating that it has been reactivated for online services.

Thank you for making these important changes!