Quicken Essentials for Mac Conversion Instructions

Quicken Essentials for Mac 2010

Web Connect

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Introduction

As Arrowhead Credit Union completes its online banking system 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 websites.

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 ***July 9th***

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

Task 2: Deactivate Your Arrowhead Credit Union Account(s)

1. Select your account under the "**Accounts**" list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Remove the checkmark from "**I want to download transactions**".
4. Click **Save**.
5. Click **Continue** when asked to confirm this deactivation.
6. Repeat steps 2 – 5 for each account at Arrowhead Credit Union.

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

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Click **List** menu > Select Arrowhead Credit Union.
4. Click **Continue**.

NOTE:	Select “Quicken Connect” for the “Connection Type” if prompted.

5. Enter your Login Credentials for Arrowhead Credit Union.
6. Click **Continue**.
7. In the “Choose your Accounts” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select your existing account, and each additional account you wish to download into Quicken Essentials.

IMPORTANT:	Do **NOT** select “**ADD**” under the action column.

8. Click **Continue**.

Thank you for making these important changes!