



Quicken Essentials for Mac Conversion Instructions

Quicken Essentials for Mac 2010

Direct Connect

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Introduction

As **KU, ConocoPhillips and 66 Federal Credit Union** completes its system conversion to **Truity Credit Union**, you will need to modify your QuickBooks settings to ensure the smooth transition of your data. To complete these instructions, you will need your User ID and Password for your current **KU, ConocoPhillips or 66 Federal Credit Union** online banking website.

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 **10/23/2013**

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 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: Connect to KU, ConocoPhillips, or 66 Federal Credit Union

1. Select your account under the "**Accounts**" list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. 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 KU, ConocoPhillips, or 66 Federal Credit Union

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 *KU, ConocoPhillips, or 66 Federal Credit Union*.

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

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

NOTE: Select "Direct Connect" for the "Connection Type" if prompted.

5. Enter your **Login Credentials** for **Truity Credit Union**.
6. In the "Choose your Accounts" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, you will want to select your existing account.

IMPORTANT: Do NOT select "ADD" under the action column.

7. Repeat step 6 for each additional account you wish to download into Quicken Essentials.
8. Click **"Save"**.

Thank you for making these important changes!