Quicken for Windows Conversion Instructions

Quicken for Windows 2011–2013

Web Connect

Table of Contents

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 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 KU, ConocoPhillips, or 66 Federal Credit Union

3. Log in to **KU, ConocoPhillips, or 66 Federal Credit Union** web site at www.kucu.org, www.copcu.org, or www.66fcu-nwa.org. 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 KU, ConocoPhillips, or 66 Federal 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 may vary depending on the services and the version of Quicken you are using.

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

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

1. Log in to *Truity Credit Union* web site at *www.TruityCU.org.*

2. Download and import 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!