Quicken for Windows Conversion Instructions

Quicken for Windows 2011–2014

Web Connect to Express Web Connect

Table of Contents

INDIANA
Members Credit Union
Keeping It Simple

Introduction

As **Indiana Members Credit Union** completes its system, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your login credentials for Indiana Members Credit Union's online banking solution, NetTeller.

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 3/3/2014.

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 Indiana Members Credit Union

1. Log in to Indiana Members Credit Union's online banking solution, NetTeller, at imcu.org, and download your transactions into Quicken.
2. Once the transactions are downloaded, accept all transactions into your Quicken account register.
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 Indiana Members 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 ***[Financial Institution A]***.

Task 4: Re-activate Your Account(s) at Indiana Member CU

1. Open the account register that you want to enable for online account access.
2. Choose **Account Actions** menu > **Set Up Online**.
3. Enter **Indiana Members CU** and click **Next**.
4. Type your **User ID** and **Password**. Click **Connect**.

NOTE:	You may be presented with a security question from your Financial Institution prior to receiving your accounts.

5. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link** or **Exists in Quicken** and select the matching accounts in the drop-down menu.

IMPORTANT:	Do **NOT** select **New** or **Add In Quicken**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

6. After all accounts have been matched, click **Next**.

   You will receive confirmation that your account(s) have been added.
7. Click **Done** or **Finish**.

Thank you for making these important changes!