Quicken Conversion Instructions

Express Web Connect

As ***Achieve Financial Credit Union*** completes its ***NEW*** online banking system conversion*,* you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

NOTE:	**Express Web Connect** uses the same User ID and Password as your financial institution's website.

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 ***Update Software*** and follow the instructions.

NOTE:	Perform the following tasks only AFTER you have successfully completed the login process to Achieve's ***NEW*** online banking service.

Task 2: Disconnect Accounts at ***Achieve Financial Credit Union*** on or after ***2-13-18***

IMPORTANT: DO NOT perform this task on a Credit Union VISA credit card account. No action is needed.

Quicken for Windows

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate**. Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. Repeat steps for each account to be disconnected at the Credit Union.

Quicken for Mac 2015 2017

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select Troubleshooting > Deactivate Downloads.
4. Repeat steps for each account to be disconnected.

Task 3: Reconnect Accounts on or after ***2-13-18***

Quicken for Windows

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to activate.
3. In the **Account Details** dialog, click the **Online Services** tab.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter ***Achieve Financial Credit Union*** in the search field, select the name in the list and click **Next**.
7. If presented with the Select Connection Method screen, select **Express Web Connect**.
8. Enter your **User ID** and **Password**. Click **Connect**.

NOTE:	You may be prompted for additional security information prior to receiving your accounts.

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

IMPORTANT:	Do **NOT** select **Add to Quicken** unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.

11. Click **Done** or **Finish**.

Quicken for Mac 2015 – 2017

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Settings**.

3. Select **Set up transaction download.**

4. Enter ***Achieve Financial Credit Union*** in the **Search** field, select the name in the **Results** list and click **Continue**.

5. Enter your **User Id** and **Password** and click **Continue**.

6. If the prompted for additional security information, enter it to continue.

NOTE:	Select "Express Web Connect" or "Quicken Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select "**Link"** to pick your existing account.

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

8. Select **Finish**.