



Quicken for Mac Conversion Instructions

Quicken for Mac 2006/2007

Web Connect

Introduction

As **LOC Federal Credit Union** completes our computer system upgrade on June 1, 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. To complete these instructions, you will need your **User ID and Password** for the **LOC 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.

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 Your Data**,” and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates**, select “**Checking for Updates to Quicken**,” and follow the instructions.

Task 2: Connect to **LOC Online Banking** for a final download by **4 p.m. on Friday, May 29**

1. Choose **Online** menu > **Download Transactions**.
2. Select your account from the drop-down list.
3. Click **Download** to access **LOC Online Banking** website at **locfederal.com**.
4. Enter your **User ID** and **Password** to login to the **LOC Online Banking** web site. Download your transactions through **May 29** into Quicken.

5. Repeat the download process for each account you have at **LOC Federal** (such as checking, savings, credit cards and brokerage).
6. Once all accounts have been downloaded, accept all transactions into your Quicken account registers.

Task 3: Deactivate Your Account(s) At **LOC Online Banking** on or after **June 1**

1. Choose **Lists** menu > **Accounts**.
2. Select the account that you want to disable and click **Edit**.
3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
4. Remove the information within the **Account Number** and **Routing Number** fields.
5. Click **OK** to save your edits.
6. Repeat steps 2 – 5 for each account at **LOC Federal**.
7. Verify that your account list does not display a blue online circle icon for any accounts at **LOC Federal**.

Task 4: Re-activate Your Account(s) at **LOC Online Banking** on or after **June 1**

1. Log in to **LOC Online Banking at locfederal.com** and download your Quicken Web Connect file.
2. Import your transactions to Quicken.

IMPORTANT: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

3. Ensure you associate the account to the appropriate account already listed in Quicken. Click the **Use an existing account** radio button.
4. Select the corresponding existing Quicken account in the drop-down list and click **OK**.
5. Repeat steps 3-4 for all accounts at **LOC Federal**.
6. Choose **Lists** menu > **Accounts**. Verify that each account at **LOC Federal** has a blue online circle indicating that it has been reactivated for online services.

Thank you for making these important changes!