

Quicken Essentials for Mac Conversion Instructions

Quicken Essentials for Mac 2010

Express Web Connect to Web Connect

Table of Contents

TABLE OF CONTENTS **1**

INTRODUCTION..... **2**

DOCUMENTATION AND PROCEDURES..... **2**

 Task 1: Conversion Preparation.....2

 Task 2: Deactivate Your Account(s) At BMI Federal Credit Union2

 Task 3: Re-activate Your Account(s) at BMI FCU 2,2

Introduction

As **BMI Federal Credit Union** completes its system conversion, 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 the **BMI Federal Credit Union** 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 **05/06/2014**.

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**, 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: Deactivate Your Account(s) At BMI 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 **BMI Federal Credit Union**.

Task 3: Re-activate Your Account(s) at BMI FCU

1. Log in to **BMI FCU** website at online.bmifcu.org.
2. Download and import your transactions to Quicken.

IMPORTANT: **DO NOT** select "**ADD**" under the action column. In the Action column, just select your existing account.

3. Repeat step 2 for each additional account.

Thank you for making these important changes!