

Quicken® Personal Finance Software 2006-2007 for Mac®
Kinecta Federal Credit Union Account Conversion Instructions
Deactivate Web Connect and Reactivate Direct Connect



As [Kinecta Federal Credit Union](#) completes its system conversion to [our new Direct Connect service for members who use Quicken](#), you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your customer ID (Member Number) and password for [Kinecta Federal Credit Union online banking](#). **This update is time sensitive and must be completed between July 31, 2008 and August 31, 2008.**

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online banking service may stop functioning properly. This conversion should take 10 minutes.

To see how your downloading experience will change after your account conversion, click [here](#).

Note: In the following screen shots, red icon numbers match the step number instructions. All credit union and register information is fictitious and for illustration only.

In this document, Quicken 2007 screen shots display. While the screens may look slightly different depending upon version, the functionality remains the same. Any instructional differences are clearly noted.



Throughout this guide, this symbol displays to indicate that there are optional FAQs.

A.

BACK UP YOUR CURRENT QUICKEN DATA (ALL members)

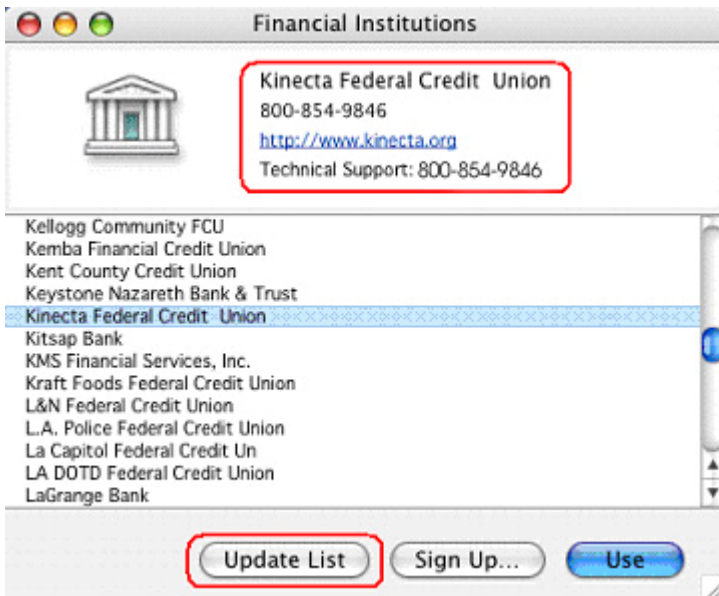
1. *Quicken for Mac 2006 and 2007 customers:* Choose **File** menu → **Back Up** → **To Disk...**
2. In the **Quicken Backup** dialog, specify which file to back up and where you want the backup saved, click the box to add the date to file name, be sure not to select on-line backups, and then click **OK**.

B.

DOWNLOAD THE LATEST QUICKEN UPDATE (ALL members)

1. *Quicken for Mac 2007 customers:* Choose **Quicken 2007** menu → **Check for Updates**.
Quicken for Mac 2006 customers: Choose **Quicken 2006** menu → **Check for Updates**.
2. If a software update is available, then you will be prompted to download the update from the Quicken Web site.
3. When the update is complete, **restart Quicken**.

- ▲ To verify you have successfully updated Quicken, verify the [Kinecta Federal Credit Union](#) information is updated in the **Financial Institutions**:
- a. Select **Online** menu -> **Financial Institutions**.
 - b. Click **Update List** in the Financial Institution Dialog.
 - c. Locate [Kinecta Federal Credit Union](#) in the list and click the [Kinecta Federal Credit Union](#)'s name.
 - d. The information for [Kinecta Federal Credit Union](#) should display [Kinecta's Federal Credit Union](#) followed by phone number 800-854-9846 and then the website: <http://www.kinecta.org> and technical support number 800-854-9846. If the information does not match – your version of Quicken has not been updated. Please perform steps 1-4 again.

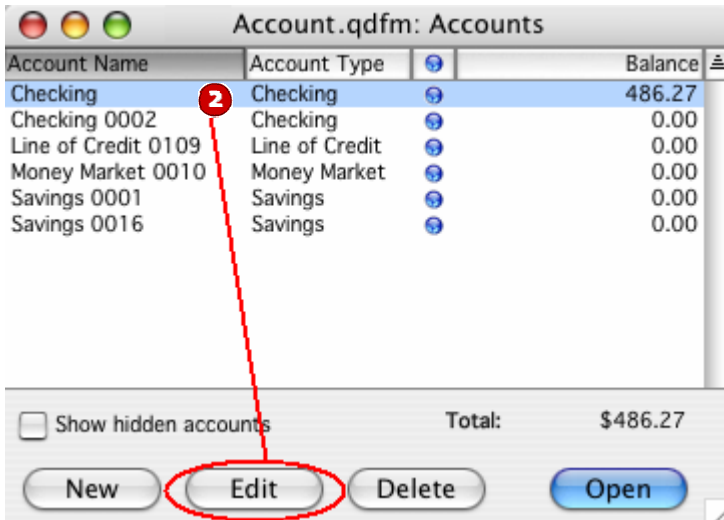


C.

DEACTIVATE YOUR ACCOUNTS for Quicken Mac 2006-2007 with OLD KINECTA FEDERAL CREDIT UNION Web Connect (ALL members)

1. Choose **Lists** menu → **Accounts**.

2. Select the account you want to disable, and click **Edit**.



3. In the **Download transactions:** drop-down list, select **not enabled**. Click **OK** to the prompt, "You are about to disable..."

4. Click OK to save your edits.

The screenshot shows the "Account Edit" dialog box. The "Download transactions" dropdown menu is set to "via web site" and is circled in red with a red number "3". The "OK" button at the bottom right is circled in red with a red number "4".

Account Name: KIN-WebConnect
Description:
Account Type: Savings
Credit Limit: 0.00
Tax Status: Tax-deferred or tax-exempt
Show Account: In lists In toolbar

Notes:

Financial Institution: Kinecta Federal Credit U...
Customer ID: xxxxxxxx
Routing Number: 322278073 (9 digits)
Account Number: 111111111

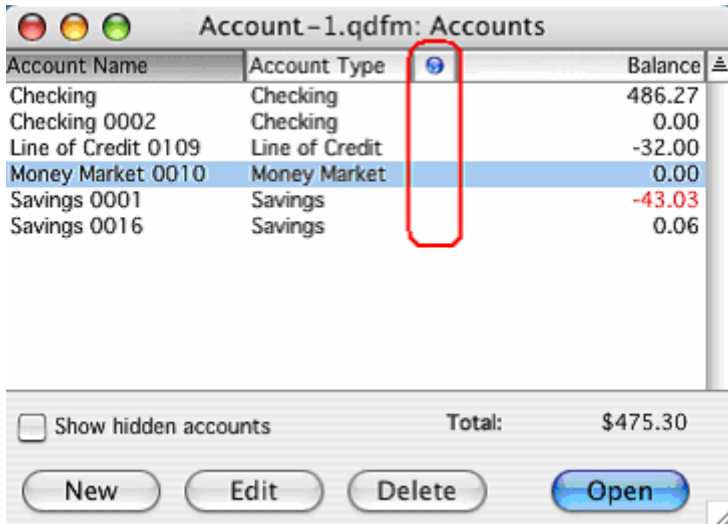
Download transactions: via web site
Auto-Reconcile Options...

Pay bills online: not available
Customer ID:
Routing Number:
Account Number:

Buttons: Cancel, OK

5. Repeat steps 2 through 4 for each [Kinecta Federal Credit Union](#) online account (such as checking, savings, line of credit and money market). As each online account is disabled, its blue online circle icon disappears.

6. Verify that your account list does not display blue online circle icons for any accounts at [Kinecta Federal Credit Union](#).



Account Name	Account Type	Balance
Checking	Checking	486.27
Checking 0002	Checking	0.00
Line of Credit 0109	Line of Credit	-32.00
Money Market 0010	Money Market	0.00
Savings 0001	Savings	-43.03
Savings 0016	Savings	0.06

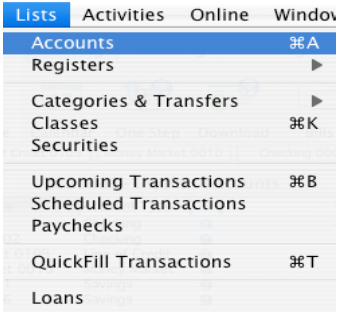
Show hidden accounts Total: \$475.30

New Edit Delete Open

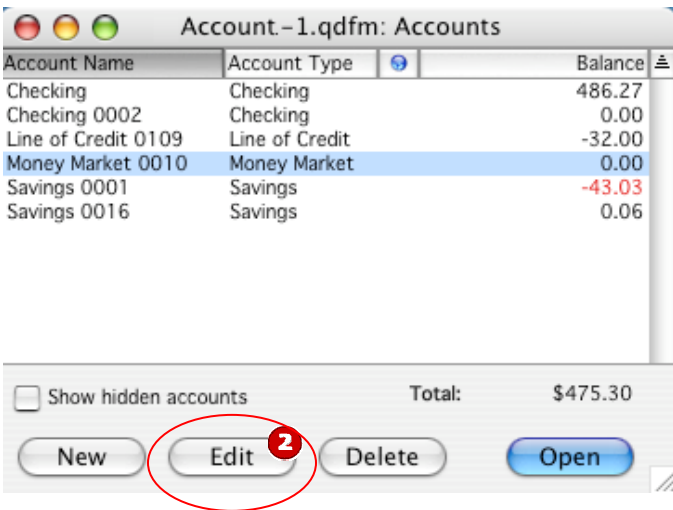
D. ACTIVATE YOUR ACCOUNTS for Quicken Mac 2006-2007 with NEW KINECTA FEDERAL CREDIT UNION Direct Connect (ALL members)

IMPORTANT: Complete **sections D and E** on or after the August 4, 208 conversion.

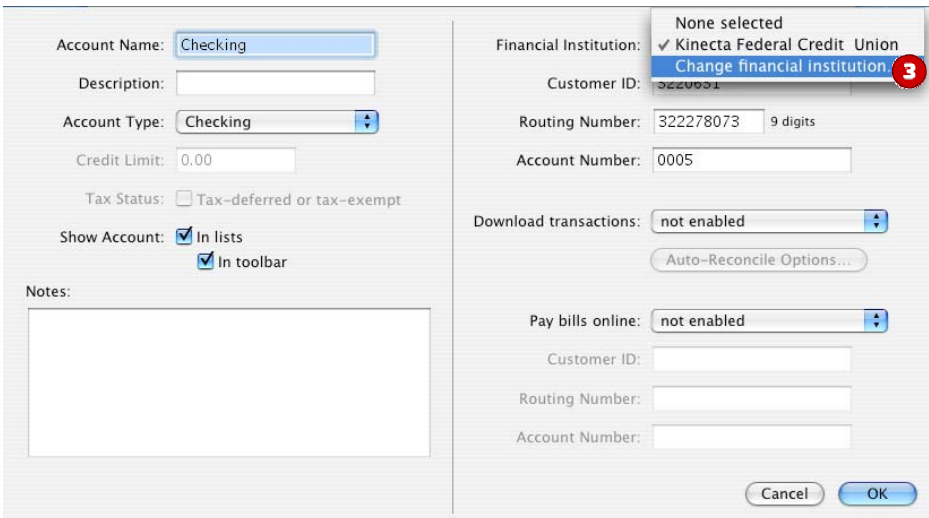
1. Choose **Lists** menu → **Accounts**.



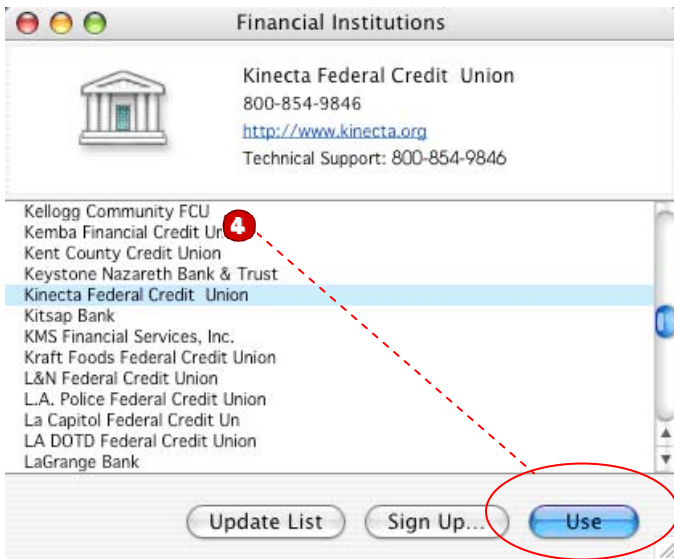
2. Select your first disabled account, and click **Edit**.



3. Click the Financial Institution drop-down list and select **Change financial institution....**



4. In the Financial Institutions dialog, select [Kinecta Federal Credit Union](#) from the list, and click **Use**.



5. Enter the customer ID (Member Number) and PIN / Password for your [Kinecta Federal Credit Union](#) online account. Click **OK**.

The screenshot shows a dialog box titled "Enter Customer ID and PIN". It has two input fields: "Customer ID:" with the value "1111111" and "PIN/Password:" with seven dots. At the bottom are "Cancel" and "OK" buttons. The "OK" button is highlighted in blue.

6. In the **Add Online Services** dialog, match your first account to the appropriate account number.

NOTE: The Intuit conversion process requires that each account number be changed to a 4-digit number.

You must match the account number in the **Add Online Services** dialog screen to discover which account it is referring to, using the following method of identification.

a. **For Share accounts (Checking, Savings and Money Markets)**, the new share account number will consist of two zeros "00" followed by the last two digits of the original account number.

For example, if your current account number is "**1234567S05**" -> then your new account number is "**0005**".

b. **For Loan accounts (Line of Credit, Auto Loan, etc.)**, the new loan account number will consist of a zero followed by a one: "01" followed by the last two digits of the original account number.

For example, if your current account number is "**1234567L09**" -> then your new account number is "**0109**".

When you have matched up the first account with its new number, click **OK**.

Add Online Services

Select the Kinecta Federal Credit Union account to use with the checking account Checking.

0001

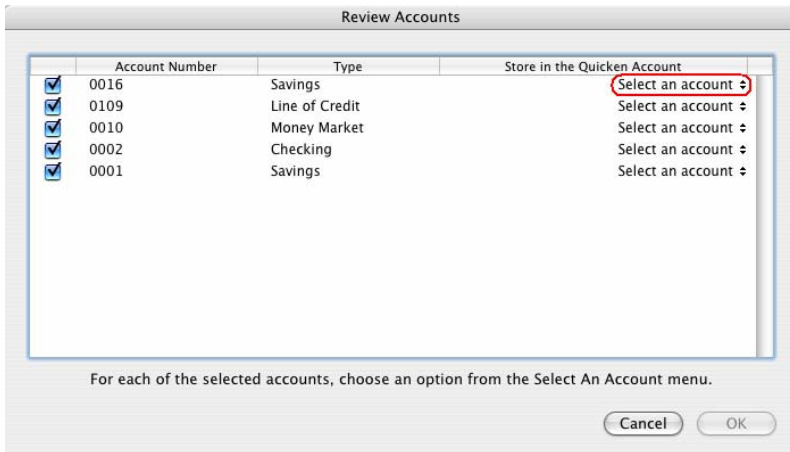
Cancel

OK

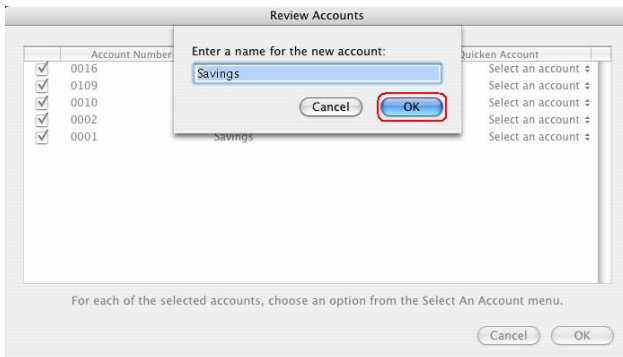
7. In the **Review Accounts** dialog, match each **Kinecta Federal Credit Union** account to the appropriate Quicken account by clicking **Select an Account...** under the Store in the Quicken Account column header.

Note: The new 4 digit account numbers in the Account Number column. Refer to step 6 to properly identify your accounts. Those with 'double zeros' at the beginning are Share accounts (Checking, Savings, Money Market), while those beginning with '01' are Line of Credit accounts.

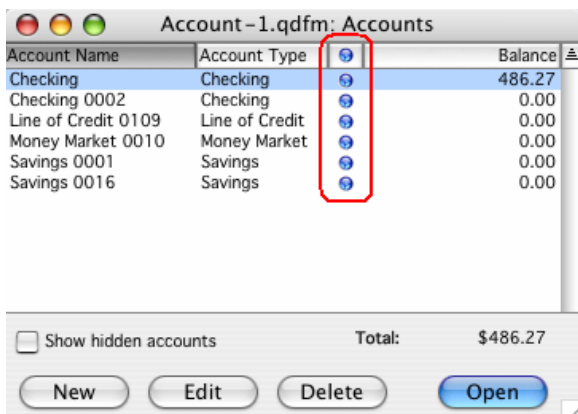
When all the accounts have been named, Click **OK**.



8. Click **OK** to close the edit register page.



9. As each online account is enabled, its blue online circle icon reappears. Verify that each **Kinecta Federal Credit Union** account in your list displays a blue online circle icon.





IMPORTANT: The download may include transaction history that already exists in your Quicken account register.

If you are successful in activating your [Kinecta Federal Credit Union](#) accounts, on your initial statement download after you have activated your [Kinecta Federal Credit Union](#) accounts, you may receive duplicate transaction history downloaded that already exists in your Quicken account registry.

This issue usually occurs ONLY when you download transactions for the first time after [Kinecta Federal Credit Union](#) makes a system conversion.

To resolve this issue, you need to delete the original transaction and keep the most recently downloaded transaction:

1. Locate the original transaction in the register and make note of its status (**R**, **C**, or blank) in the **Clr** column. If you reconcile your accounts regularly, the transaction status most likely shows as **R** (Reconciled).
2. Delete the original transaction:
 - a. In the register, select the transaction.
Note: In Quicken Windows, you may select multiple transactions.
 - b. Click **Edit**, and then choose **Delete Transaction**.
 - c. Click **Yes** to the confirmation message.
3. Locate the duplicate transaction that was downloaded. Its status shows as **C**.
4. Change the status to match the transaction that was deleted by clicking in the **Clr** column of the duplicate transaction.
5. Click **Enter** to save any changes to the transaction.
6. Repeat these steps for each set of duplicate transactions.



If you use the Password Vault, be sure to update it with your new Kinecta Federal Credit Union password. See Update your PIN Vault at <http://www.quicken.com/conversionfaq>.

E.

CONNECT TO Kinecta Federal Credit Union Direct Connect for Quicken Mac 2006-2008 (ALL members)

1. Choose **Online** menu → **Download Transactions....**

2. Click to select your account from the drop-down list.

3. Click **Download....**

Download Transactions

• Checking **2** Download... **3** Kinecta Federal Credit Union XXXXXX

Online balance as of 7/18/08: \$486.27

Date	Number	Payee (Category)	Payment	Deposit
7/18/08	WITHD	Withdrawal KIOSK Transfer	1.00	
7/18/08	DEP	Deposit INTERNET BANKING Transfe		1.00

Accept Accept All Unmatch Delete Matched New

Date	Number	Payee/Category/Memo	Payment	Clr	Deposit	Balance
7/9/08	DEP	Deposit Home Banking Transfer From Share		C	1.10	484.27
7/9/08	DEP	Deposit Home Banking Transfer From Share		C	2.00	486.27
7/18/08	WITHD	Withdrawal Home Banking Transfer To Shar	1.00	C		485.27
7/18/08	DEP	Deposit Home Banking Transfer From Share		C	1.00	486.27
7/18/08	WITHD	Withdrawal KIOSK Transfer	1.00		Deposit	

Record Restore

4. Enter your PIN or PIN Vault PIN, and click **OK**.

⚠ If you use the PIN Vault, choose **Help** menu → **Quicken Help**. In the **Ask a Question** prompt, enter **Editing a PIN Vault entry**.

NEW FUNCTIONALITY WITH YOUR QUICKEN DIRECT CONNECT ACCOUNT

As a result of this account conversion, you now have the convenience of downloading directly within Quicken. Now, each time you perform an account download, you'll do a **One Step Update** rather than a Web site download. Choose **Online** menu → **One Step Update**. Click to select the download options you want, enter your financial institution's password, and click **Update Now**.

Your **Direct Connect** accounts may also offer new functionality and services such as online transfers. Contact [Kinecta Federal Credit Union](#) for more information; see below for contact information.

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!

If you have any questions regarding these instructions, then click <http://www.quicken.com/conversionfaqs> to access [Quicken FAQs for Financial Institution Conversion Customers](#).

You may also contact us at 800-854-9846. A member service representative will be available to assist you from 7:00A.M. to 7:00P.M. Monday – Friday. You may also visit the [Kinecta Federal Credit Union](#) Web site at <http://www.kinecta.org> or refer to: <http://www.intuit.com/support/quicken>.