Quicken® Personal Finance Software 2007-2008 for Windows®
Kinecta Federal Credit Union Account Conversion Instructions
Deactivate Web Connect and Reactivate Direct Connect

KINECTA
FEDERAL CREDIT UNION

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: Vista users will need to have administrator rights to complete the conversion process.

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.

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

A. BACK UP YOUR CURRENT QUICKEN DATA
(ALL members)

1.	Select **File** Menu → **Back Up**

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.	Select **Online** menu → **One Step Update**.

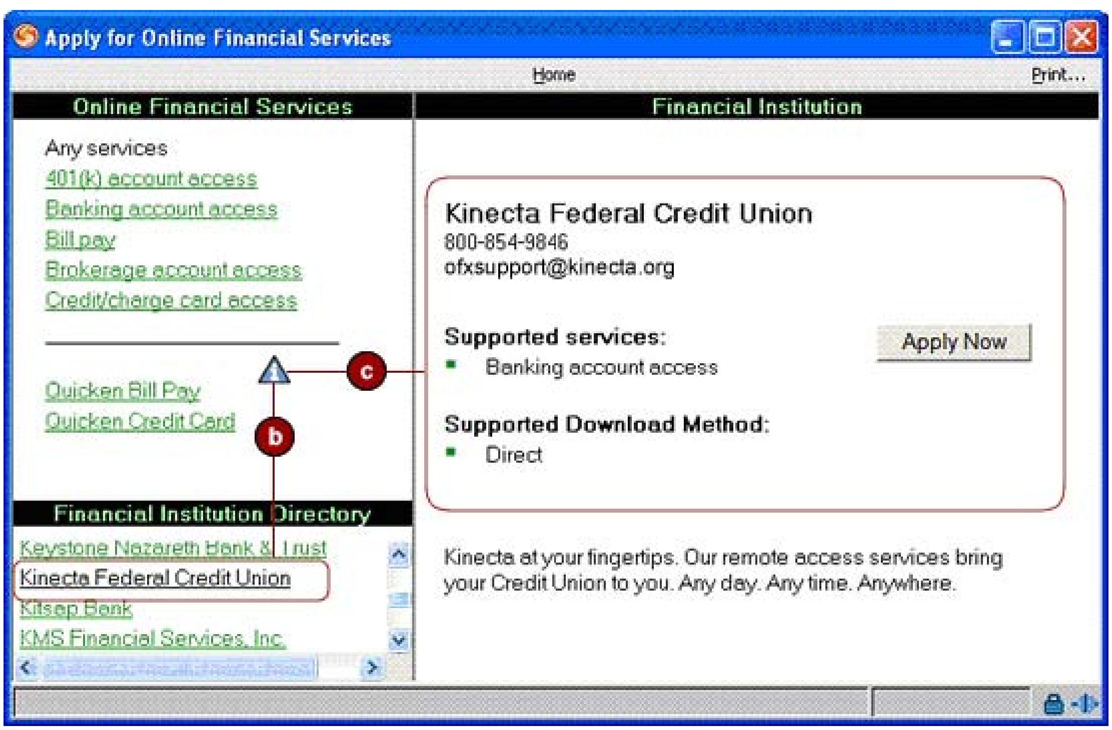
2.	Clear all options (uncheck all items) in the **One Step Update** dialog box and then click **Update Now**.

3.	If a software update is available, then you will be prompted to apply it now.

4.	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 **Participating Financial Institutions**:

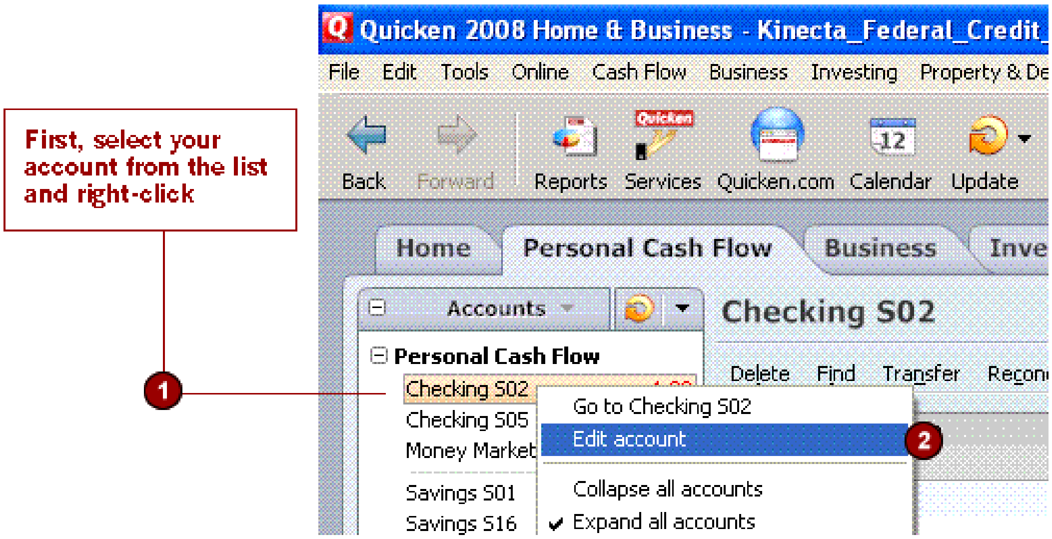
a. Select Online menu -> **Participating Financial Institutions**.
b. Locate Kinecta Federal Credit Union in the list and click the Kinecta Federal Credit Union's name.
c. Verify Kinecta Federal Credit Union **Supported Download Method** shows **Direct** only and Kinecta Federal Credit Union's logo does not appear on the screen.



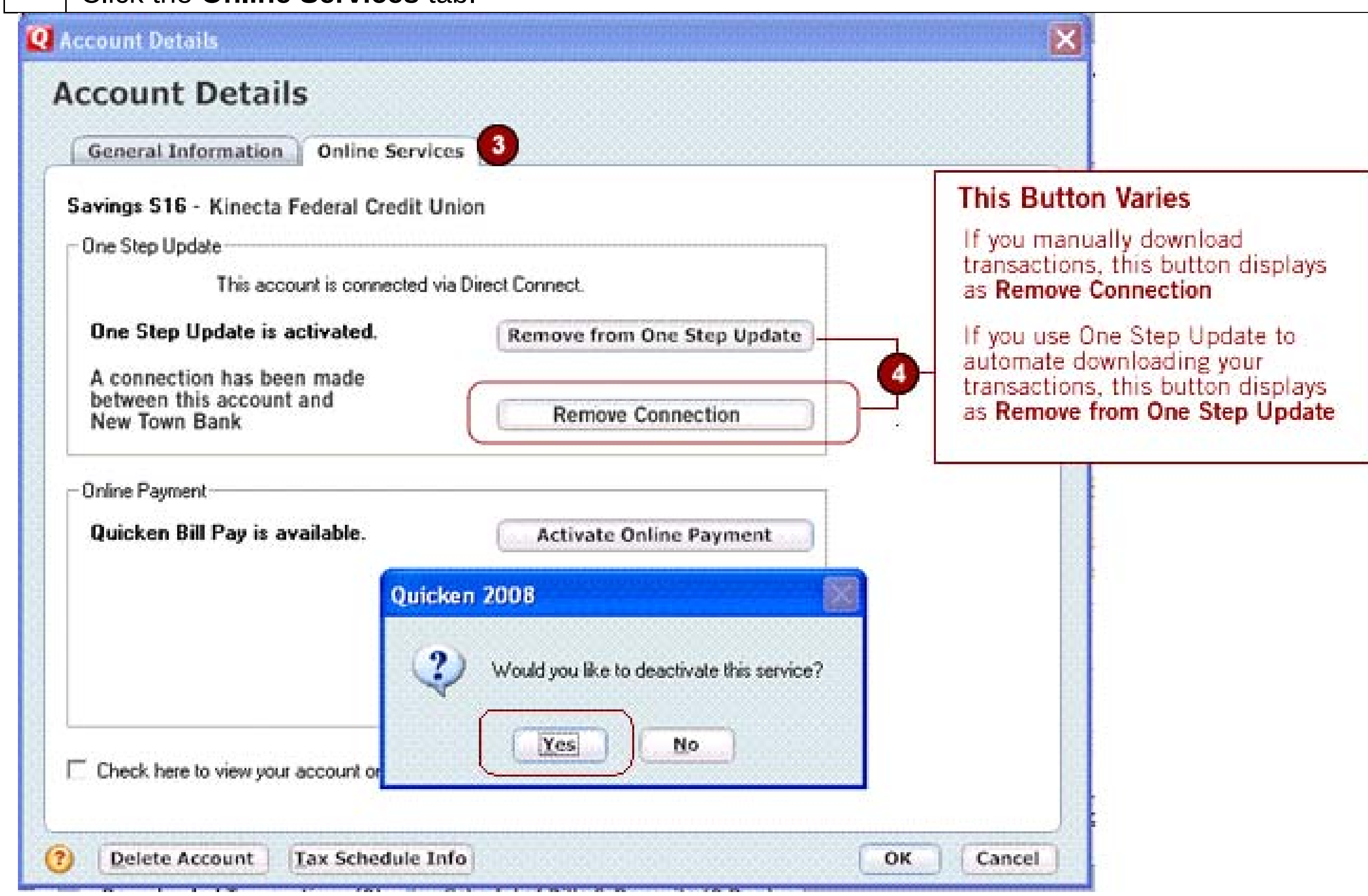
C.	DEACTIVATE YOUR ACCOUNTS for Quicken Windows 2007-2008 with OLD KINECTA FEDERAL CREDIT UNION Web Connect (ALL members)

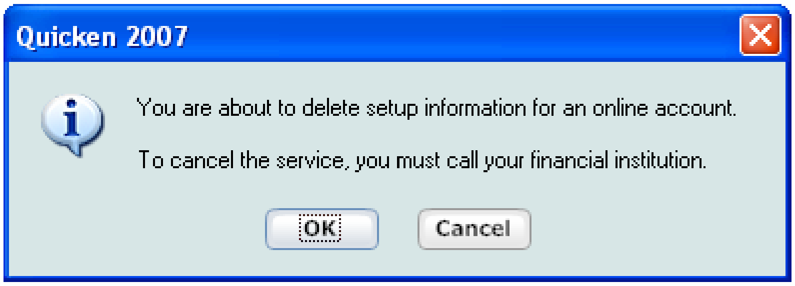
1.	Right-click your first applicable Kinecta Federal Credit Union account from the list of accounts under **Cash Flow Center**.

2.	Select **Edit** account from the drop-down list.



3.	Click the **Online Services** tab.



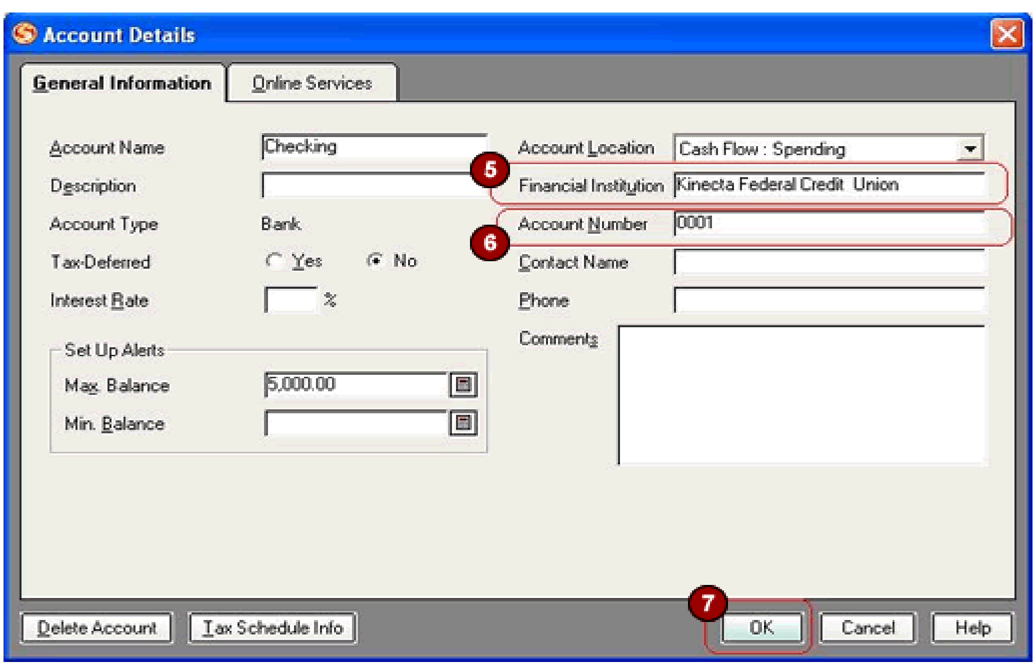


4.	Click **Remove Connection** or **Remove from One Step Update** in the **One Step Update** area. Confirm the remaining prompts.

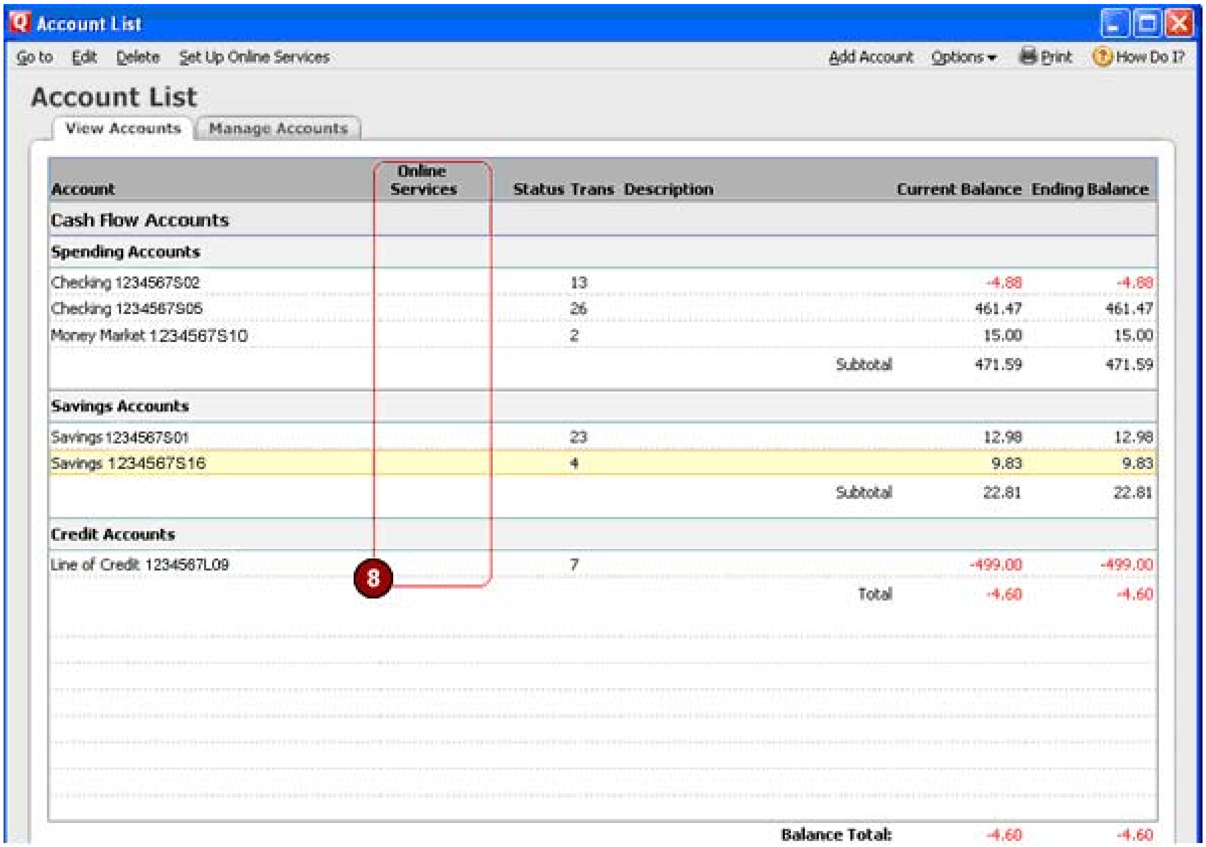
5.	Click the **General Information** tab. In the **Financial Institution** field, verify the Kinecta Federal Credit Union name.

6.	Click the **General Information** tab and edit **Account Number** field. Each account number must be changed to a 4-digit number: 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**”.

7.	Click **OK** to close the **Account Details** dialog.



8.	**Repeat steps 1 through 7** for each account (such as checking, savings, and line of credit). Verify that each account is deactivated by choosing **Tools** menu → **Account List**. As each online account is deactivated, the word **Activated** disappears for each account in the **Online Services** column.

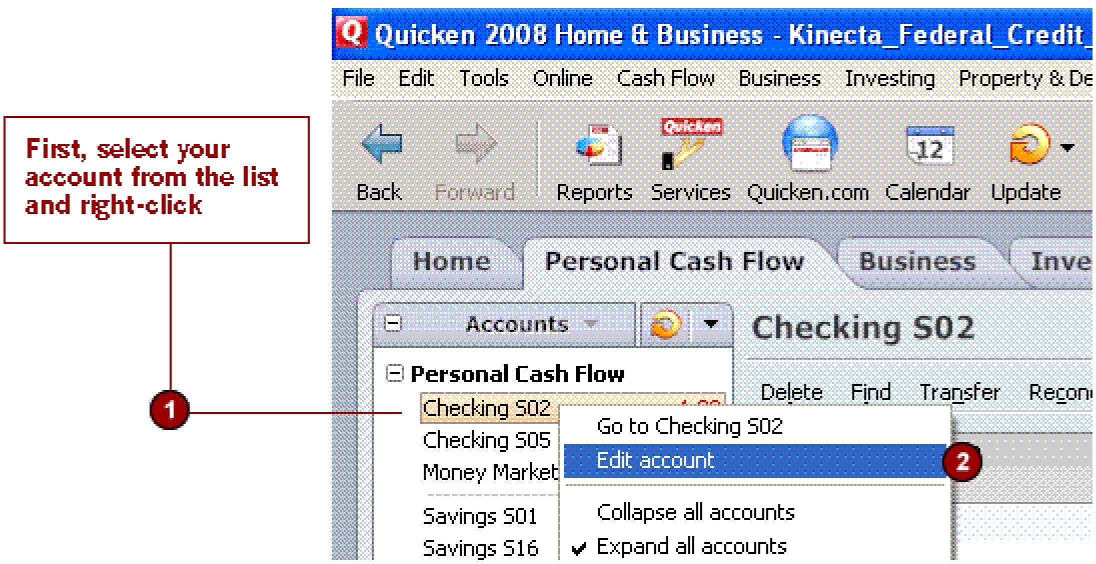


D.	ACTIVATE YOUR ACCOUNTS for Quicken Windows 2007-2008 with NEW KINECTA FEDERAL CREDIT UNION Direct Connect (ALL members)

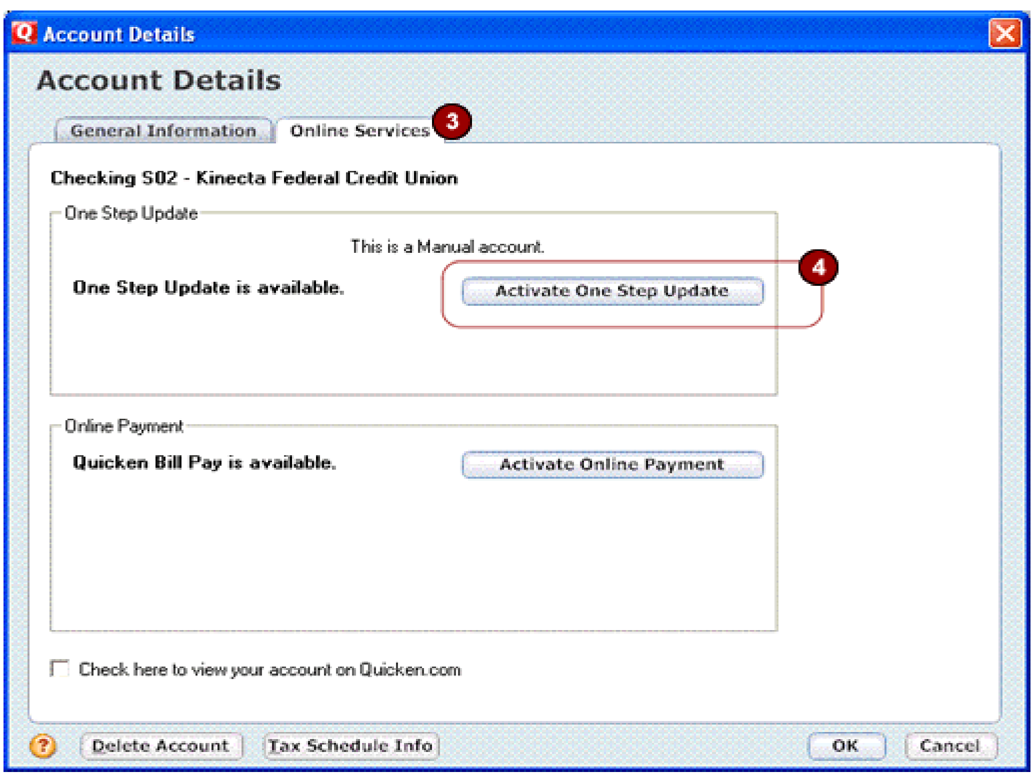
IMPORTANT: Complete **section D** *on or after* the August 4, 2008 conversion.

1.	Right-click your first Kinecta Federal Credit Union account from the list of accounts under **Cash Flow Center**.

2.	Select **Edit** account from the pop-up menu.



3.	Click the **Online Services** tab.

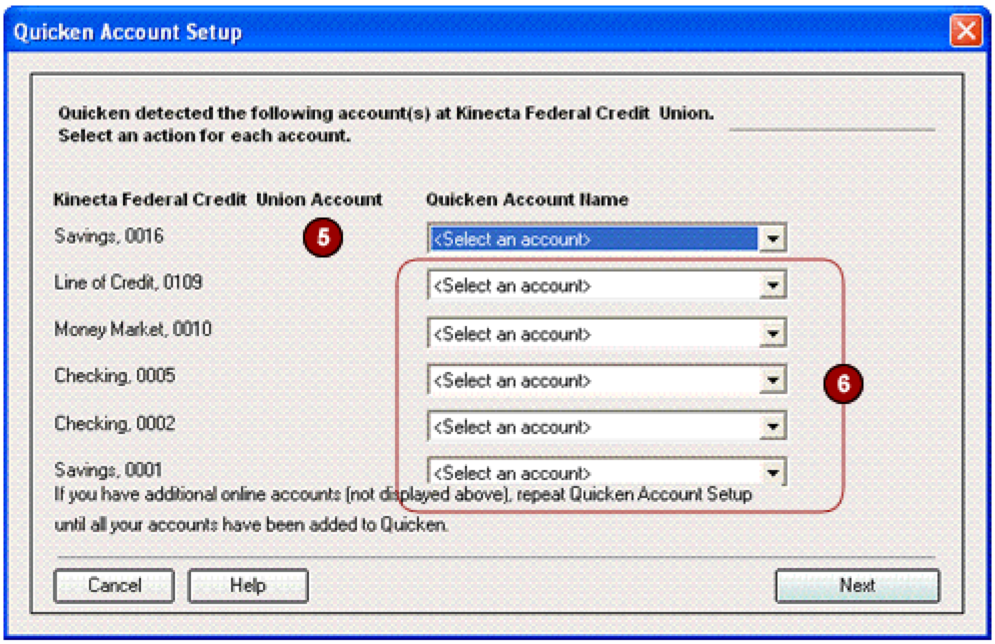


4. Click **Activate One Step Update** in the **One Step Update** area. Confirm the remaining prompts.

   Note: If **Activate One Step Update** in the **One Step Update** area is missing and the "**One Step update is not available**" message appears in its place, please see **FAQ** below.

5. Follow the on-screen instructions, and enter the account information. If you have more than one account, then match each Quicken account to the appropriate account in the drop-down list, and complete the remaining prompts. It's imperative that you match your Quicken account with your Kinecta Federal Credit Union account accurately.

6. If you have more than six accounts, then repeat **steps 1 through 5** for each additional set of six accounts that you use with online services.

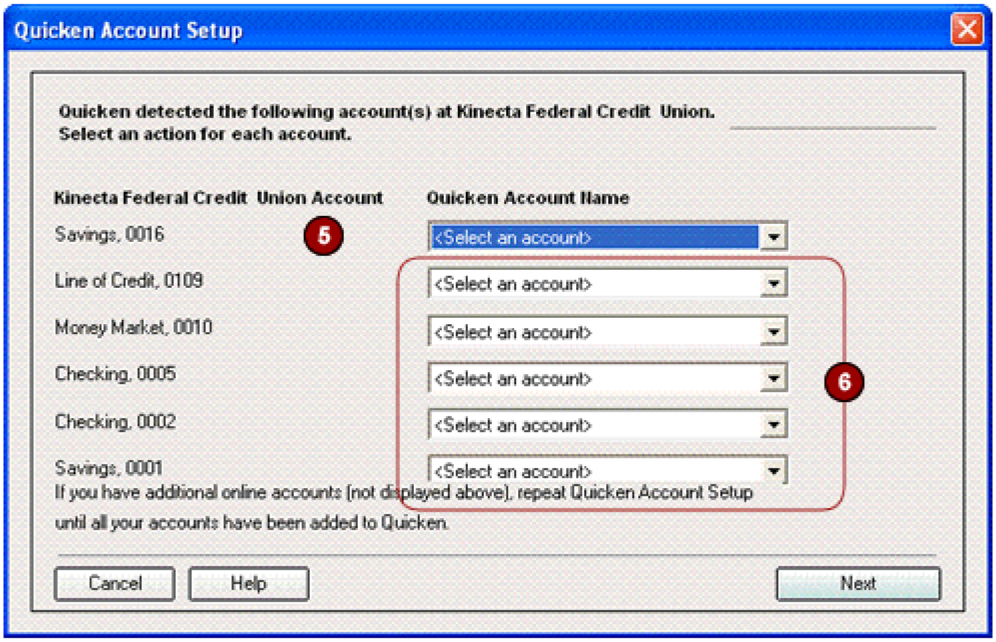


7. It is a good idea to verify that your online account list is accurate and that your accounts are activated. To do this:
   a. Choose the **Tools menu**>**Account List**.
   b. Verify that the word **Activated** appears in the Online Services column for all of your Kinecta Federal Credit Union accounts.

If **Activate One Step Update** in the **One Step Update** area is unavailable and the "**One Step update is not available**" message appears in the screen, please follow below steps:

a. Close the **Account Details** window.
b. Click on **Add Account** button on the bottom left screen.
c. On the **Quicken Account Setup** process window where Quicken prompts, "What is the financial institution for this account?", enter Kinecta Federal Credit Union. Click **Next**.
d. When Quicken prompts, "How do you want to set up your Kinecta Federal Credit Union account(s)?" select **Yes** radio button.
e. When Quicken prompts, "Log in to setup Kinecta Federal Credit Union account(s) in Quicken", enter your online banking member ID (Member Number) and password.
f. After the account is successfully downloaded, Quicken will display a list of downloaded account, which allows user to match to the existing account in the **Cash Flow Center**.
g. Follow the on-screen instruction and manually match each downloaded Quicken account to the

	appropriate Kinecta Federal Credit Union account in the drop-down list, and complete the remaining prompts. If you have more than one account, then match each Quicken account to the appropriate account in the drop-down list, and complete the remaining prompts.



⚠	**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/conversionfaqs**.

⚠	**To verify that all your online accounts have been reactivated, see *Account List Maintenance* at http://www.quicken.com/conversionfaqs.**

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.