

Quicken Conversion Instructions

With the SECU Member Access conversion completed, members will need to modify Quicken® software settings to ensure that data connectivity continues in the new system. This document contains instructions for both Windows and Mac for the new connectivity types (Web Connect or Express Web Connect). These instructions refer to two Action Dates. The 1st Action Date and 2nd Action Date are provided in this document.

Important: Express Web Connect will not be available until five business days after the 2nd Action Date, so please utilize Web Connect connectivity type if you need transaction updates during this downtime. There is no delay for Web Connect.

Quicken Windows Web Connect

On the 1st Action Date:

1. Backup Quicken Windows Data File and Update.
 - a. Choose File > Backup and Restore > Backup Quicken File.
 - b. Download the latest Quicken Update. Choose Help > Check for Updates.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Repeat this step for each account you need to update.
 - c. Accept all new transactions into the appropriate registers.

On the 2nd Action Date:

1. Deactivate online banking connection for accounts connected to State Employees Credit Union - NC.
 - a. Choose Tools > Account List.
 - b. Click Edit on the account to deactivate.
 - c. In Account Details, click Online Services.
 - d. Click Deactivate. Follow prompts to confirm deactivation.
 - e. Click the General tab.
 - f. Delete Financial Institution and Account Number information.
 - g. Click OK to close window.
 - h. Repeat steps for any additional accounts.
2. Reconnect online banking connection for accounts that apply.
 - a. Download a Quicken Web Connect file from SECU Member Access.
 - i. Navigate to account summary screen on the desktop website (not available in mobile app).
 - ii. Select the "Account settings" drop-down menu towards the top right of the screen (above Quick Actions menu).
 - iii. Select "Export transactions."
 - iv. Select the Export type from the Export drop-down menu under "File type."
 - v. Select "Quicken."
 - vi. Select the checkboxes for the accounts you want included in your file download.
 - vii. Select the Data type (must be Transactions).
 - viii. Select the export start/end dates and click Download.
 - b. In Quicken, choose File > File Import > Web Connect (.QFX) File.

- c. Use the import dialog to select the Web Connect file you downloaded. An “Import Downloaded Transactions” window opens.
- d. Choose Link to an existing account. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
- e. Repeat this step for each account you have connected to State Employees Credit Union - NC.

Quicken Mac Web Connect

On the 1st Action Date:

1. Backup your Quicken Mac data file and update the application.
 - a. Choose File > Save a Backup.
 - b. Download the latest Quicken Update. Choose Quicken > Check for Updates.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Repeat this step for each account you need to update.
 - c. Accept all new transactions into the appropriate registers.

On the 2nd Action Date:

Activate online banking connection for accounts connected to State Employees Credit Union - NC.

1. Select your account under the Accounts list on the left side.
2. Choose Accounts > Settings.
3. Select Set up transaction download.
4. Enter State Employees Credit Union - NC in the search field, select the correct option, and click Continue.
5. Log in to SECU Member Access and download your transactions to your computer.

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.

6. Drag and drop the downloaded file into the box titled Drop download file. Choose Web 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, click Link to pick your existing account.

Important: Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken.

8. Click Finish.

Quicken Windows Express Web Connect

On the 1st Action Date:

1. Back up your Quicken Windows Data File. Go to File > Backup and Restore > Backup Quicken File.
2. Download the latest Quicken Update. Go to Help > Check for Updates.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

On the 2nd Action Date:

1. Deactivate online banking connection for accounts connected to State Employees Credit Union - NC.
 - a. Choose Tools > Account List.
 - b. Click Edit on the account to deactivate.
 - c. In Account Details, click Online Services.
 - d. Click Deactivate. Follow prompts to confirm deactivation.
 - e. Click the General tab.
 - f. Delete Financial Institution and Account Number information. Click OK to close window.
 - g. Repeat steps for any additional accounts that apply.
2. Reconnect the online banking connection for your accounts.
 - a. Choose Tools > Account List.
 - b. Click Edit on the account you want to activate.
 - c. In Account Details, click Online Services and then choose Set up Now.
 - d. Type State Employees Credit Union - NC in the search field and click Next.
 - e. Enter your SECU credentials.
 - i. Express Web Connect uses the same credentials you use for your SECU Member Access login.

Important: If your credentials do not work, contact SECU.

- f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select Link to an existing account and select the matching accounts in the drop-down menu.

Important: Do NOT choose “Create a new account” 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, choose Ignore – Don’t Download into Quicken or click Cancel.

- g. After all accounts have been matched, click Next and then Done.

Quicken Mac Express Web Connect

On the 1st Action Date:

1. Backup Quicken Mac Data File and Update the application.
 - a. Choose File > Save a Backup.
 - b. Download the latest Quicken Update. Choose Quicken > Check for Updates.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Accept all new transactions into the appropriate registers.

On the 2nd Action Date:

Activate the online banking connection for accounts connected to State Employees Credit Union - NC.

1. Click your account in the Accounts list on the left side.
2. Choose Accounts > Settings.
3. Select Set up transaction download.
4. Enter State Employees Credit Union - NC in the search field, select the correct option and click Continue.
5. Enter your SECU credentials.
 - a. Express Web Connect uses the same credentials you use for your SECU Member Access login.

Important: If your credentials do not work, contact SECU.

6. In the “Accounts Found” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under Action, choose Link to pick your existing account.

Important: Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken.

7. Click Finish.