Quicken Essentials for Mac Conversion Instructions
[Quicken Essentials for Mac 2010 - 2012 EWC to EWC]

As Latah FCU completes its system conversion to Latah Federal Credit Union - New, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your customer ID and PIN for the Latah FCU and Latah Federal Credit Union – New websites.

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.

This update is time sensitive and can be completed on or after 05/04/2012.

Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu → **Search**. Search for "Backing Up" and 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" and select " Check for Updates..." and follow the instructions.

Connect to Latah FCU

1. Select your account under the **"Accounts"** list on the left side.

2. Choose **Accounts** menu →Select "**Update Selected Online Account**".

3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Deactivate Your Account(s) At Latah FCU

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.

Note: Repeat steps 2 –5 for each account at Latah FCU.

Re-activate Your Account(s) At Latah Federal Credit Union - New

1. Select your account under the **"Accounts"** list on the left side.

2. Choose **Accounts** menu →Select "**Update Selected Online Account**".

3. Click "**List**" →Select Latah Federal Credit Union - New

4. Click "**Continue**".

Select "**Quicken Connect**" for the "**Connection Type**" if prompted.

5. Click "**Save**".

6. Enter your "Login Credentials" for Latah Federal Credit Union - New.

7. Click "**Continue**".

8. In the "Choose your Accounts" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, you will want to select your existing account.

DO NOT select "**ADD"** under the action column.

9. Repeat step 8 for each additional account you wish to download into Quicken

10. Click "**Continue**".

Thank you for making these important changes!