


Quicken® 2007-2008 for Windows® Consumers Credit Union Account Conversion Instructions

[Insert Your
Logo Here]

As Consumers Credit Union completes its system conversion to Consumers Credit Union, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need to be able to log in to the Web sites of Consumers Credit Union and Consumers Credit Union.

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

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

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

A.

BACK UP YOUR CURRENT DATA

1. Choose File menu → Backup.
2. Specify which file to back up and where you want the backup saved in the Quicken Backup dialog, and then click OK.

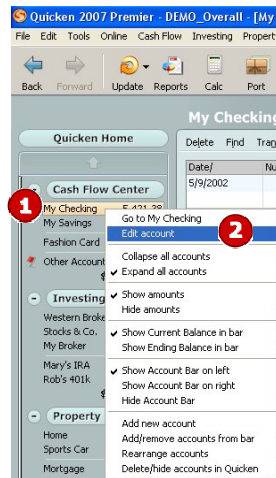
B.

DOWNLOAD THE LATEST QUICKEN UPDATE

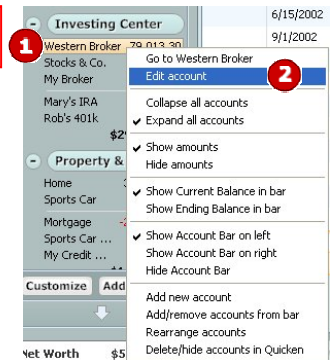
1. Choose Online menu → One Step Update.
2. In the One Step Update Settings dialog, uncheck any boxes that are checked, and then click Update Now.
3. If a software update is available, then you will be prompted to apply it now.
4. Once the update is complete, restart Quicken.

1. *Quicken banking customers:* right-click your first Consumers Credit Union account from the list under Cash Flow Center.
Quicken investing customers: right-click your first Consumers Credit Union account in the Investing Center.
2. Select Edit account from the pop-up menu.

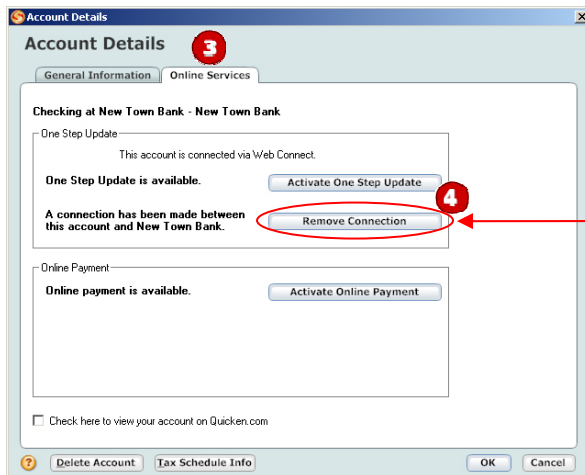
Banking Customers



Investing Customers



3. In the Account Details dialog, click the Online Services tab.



This button varies:

- If you manually download transactions, this button displays as **Remove Connection**.
- If you use One Step Update to automate downloading your transactions, this button displays as **Remove from One Step Update**.

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, type Consumers Credit Union. Optionally, edit the Account Name field to reflect the new financial institution.
6. Click OK to close the Account Details dialog.

Repeat steps 1 through 6 for each Consumers Credit Union account from which you download transactions.

D.

ACTIVATE YOUR ACCOUNTS WITH Consumers Credit Union

1. Open a Web browser and log in to Consumers Credit Union's Web site:

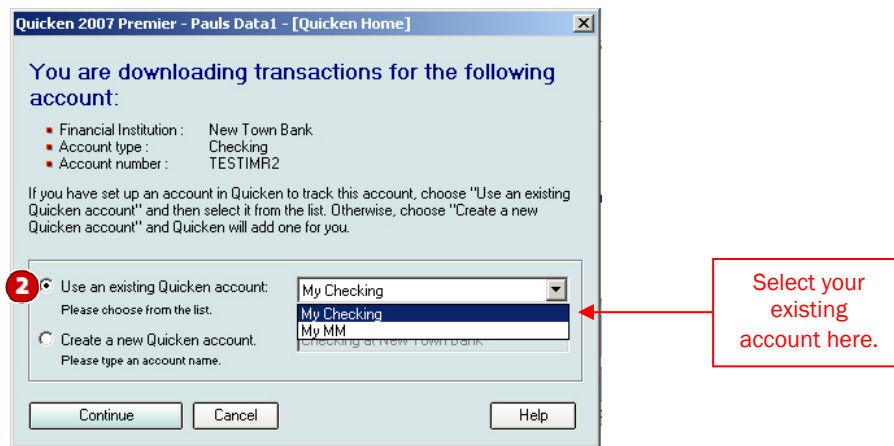
<https://www.consumerscu.org>. Click on an account and go to Advanced History.

Download your transactions into Quicken.



Important: To avoid the possibility of creating duplicate records when downloading into Quicken, select a "from" date that does not include records previously downloaded from Consumers Credit Union.

2. Click the Use an existing Quicken account radio button. In the corresponding drop-down list, select the Quicken account that you used for Consumers Credit Union.



Repeat steps 1 and 2 for each account that you will use for online banking or investing with Consumers Credit Union.

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 800-991-2221. A customer service representative will be available to assist you from 8:00A.M. to 7:00P.M. Mon-Fri. You may also visit the Consumers Credit Union Web site at <https://www.consumerscu.org> or refer to: <http://www.intuit.com/support/quicken>.