Quicken for Windows Conversion Instructions [Quicken for Windows 2010 – 2012 EWC to EWC]

As Cyprus Credit Union completes its new Home Banking conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your customer ID and Password. If your password contains these special characters &, >, <, you might experience problems connecting through Quicken. To resolve this, you will need to change your Home Banking password.

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.

Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu → **Quicken Help**. Search for "Backup Data File" and follow the instructions.

2. Download the latest Quicken update. For instructions to download to download an update, choose **Help** menu → **Quicken Help**. Search for "Update Software" and follow the instructions.

Deactivate Your Account(s)

1. Choose **Tools** menu → **Account List**.

2. Click the **Edit** or **Edit Details** button of the account you want to deactivate.

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

4. Click **Deactivate** or **Remove from One Step Update.** Follow the prompts to confirm the deactivation.

   Note: The name of the buttons referenced above may vary depending on the services you currently use and the version of Quicken you are using.

5. Click on the **General** or **General Information** tab.

6. Delete the Account Number.

7. Delete the name of the Financial Institution. Click **OK** to close the window.

8. **Repeat** steps 2 – 7 for each account at Cyprus Credit Union

Re-activate Your Account(s) at Cyprus Credit Union through Quicken

1. Open the account register that you want to enable for online account access.

2. Choose **Account Actions → Set Up Online**.

3. Enter **Cyprus Federal Credit Union - NEW** and click **Next**. You may see Cyprus Federal Credit Union and Cyprus Federal Credit Union – NEW. **You will need to select Cyprus Federal Credit Union - NEW**

4. Type your User ID (member number) and Password. Click **Connect.**

   ⚠ **Note: You may be presented with a security question from your Financial Institutions prior to receiving your accounts.**

5. Ensure you associate the account to the appropriate account already listed in Quicken. **You will want to select Link or Exists in Quicken** and select the matching accounts in the drop-down menu.

   📝 **DO NOT** select **New** or **Add In Quicken**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

6. After all accounts have been matched, click **Next.**

7. Quicken should now attempt to connect to the new Cyprus Credit Union Homebanking.

   ⚠ The initial connection will pull in the last 90 days of transactions. This is a Quicken function that we have no control over. You will need to go through the transactions one by one and delete any that you already have in your account.

8. You will receive confirmation that your account(s) have been added → Click **Done** or **Finish**.

Thank you for making these important changes!