Quicken for Windows Conversion Instructions
For Carolina Foothills Federal Credit Union

As Community 1 Federal Credit Union completes its name change to Carolina Foothills Federal Credit Union, 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 PIN.

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 must be completed on or after Oct 26, 2012.

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.

Connect to Community 1 Federal Credit Union on Quicken

1. Choose **Tools** menu → **One Step Update**.
2. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.
3. In the One Step Update Settings dialog, make sure all items are checked and click **Update Now**.

4. If new transactions display in the Online Update Summary, accept them in your Quicken account register.

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. Delete the Account Number.
6. Delete the name of the Financial Institution. Click **OK** to close the window.
7. Repeat steps 2 – 7 for each account at Community 1 Federal Credit Union

Re-activate Your Account(s) at Carolina Foothills Federal Credit Union.

1. Open the account register that you want to enable for online account access.
2. Choose **Account Actions → Set Up Online**.
3. Enter **Carolina Foothills Federal Credit Union** and click **Next**.
4. Type your User ID 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. You will receive confirmation that your account(s) have been added → Click **Done** or **Finish**.

Thank you for making these important changes!