



Quicken for Windows 2010 - 2013 Conversion Instructions

Web Connect to Web Connect

As DFCU Financial completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your (Member Number and PIN) for DFCU OnLine. 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. Back-up your data file. For instructions to back-up your data file, choose Help menu / Search. Search for and select "Backing Up Your Data" and follow the instructions.
2. Download the latest Quicken update. For instructions to download an update, choose Help menu / Search. Search for and select "Checking for updates to Quicken" and follow the instructions.

Connect to DFCU OnLine

1. Log in to DFCU OnLine at <https://www.dfcufinancial.com> then download your transactions into Quicken.
2. Once the transactions are downloaded, accept all transactions into your Quicken account register.
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 DFCU OnLine

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 version of Quicken.

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 DFCU Financial.

Re-activate Your Account(s) At DFCU OnLine

1. Log in to DFCU OnLine at <https://www.dfcufinancial.com>.
2. Download your transactions to Quicken.
3. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select "Link to an existing account" or "Use an existing Quicken account" and select the matching account in the drop-down menu.
DO NOT select Create a new account or Create a new Quicken account. If you are presented with accounts you do not want to track in this data file, select Ignore – Don't Download into Quicken or click the Cancel button.
4. Repeat steps 2 – 3 for all of your accounts.

If you have any further questions, please contact us at: **888.336.2700**