



Quicken for Mac Conversion Instructions

Quicken for Mac 2011–2014 Web Connect

Introduction

As **ELGA Credit Union** completes its system 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 login credentials for the **ELGA Credit Union** website.

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.

Documentation and Procedures

Task 1: Deactivate Your Account(s) At ELGA Credit Union

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.
6. Repeat steps 2 – 5 for each account at **ELGA Credit Union**.

Task 2: Re-activate Your Account(s) at ELGA Credit Union

7. Select your account under the **Accounts** list on the left side.
8. Choose **Accounts** menu > **Update Selected Online Account**.
9. Click **List** menu > Select **ELGA Credit Union**.
10. Click **Continue**.

NOTE: Select "Quicken Connect" for the "Connection Type" if prompted.

11. Enter your Login Credentials for ***ELGA Credit Union.***
12. Click **Continue.**
13. In the "Choose your Accounts" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select your existing account, and each additional account you wish to download into Quicken Essentials.

IMPORTANT: Do **NOT** select "**ADD**" under the action column.

14. Click **Continue.**

Thank you for making these important changes!