



Introduction

As Icon Credit Union completes its system conversion to a new online banking service, 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 old Icon online banking (**listed in Quicken as Icon Credit Union**) and the new Icon online banking (**listed as Icon Credit Union New**) websites.

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.

NOTE: This update is time sensitive and can be completed on or after **May 7, 2014**.

Documentation and Procedures

Task 1: 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 an update, choose **Help** menu > **Quicken Help**. Search for **Update Software** and follow the instructions.

Task 2: Deactivate Your Account(s) At Icon Credit Union

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. Remove the **Account Number**.
6. Remove the name of **Icon Credit Union**. Click **OK** to close the window.
7. Repeat steps 2–6 for each account at Icon.

Task 3: Re-activate Your Account(s) with Icon Credit Union New

1. Open the account register that you want to enable for online account access.
2. Choose **Account Actions** menu > **Set Up Online**.
3. Enter **Icon Credit Union New** and click **Next**.
4. Type your **User ID** and **Password**. Click **Connect**.

NOTE: You may be presented with a security question from Icon prior to receiving your accounts. **You must have re-enrolled in Online Banking from Icon Credit Union to re-activate your account in Quicken.**

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.

IMPORTANT: 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**.
You will receive confirmation that your account(s) have been added.
7. Click **Done** or **Finish**.

Thank you for making these important changes!