Quicken for Windows

Ensuring you have the latest version:

1. Select the **Tools** menu > **One Step Update**.
2. Click **Update Now**.

- If an update to Quicken is available, Quicken displays a window that describes what's in the update, as well as brief instructions for downloading the update.
- You'll need to exit Quicken to run the update program.
- When you exit, all your work is saved, and you can resume working as soon as the update finishes.

How to set up an account:

1. Click on **Accounts** on the top left side of Quicken, then click on **Add Accounts** down at the bottom.
2. Choose the type of account you wish to add, such as Checking or Savings, then click Next.

   Note: Any share that isn't a Checking account such as a Money Market, CD, etc will be considered a Savings account by Quicken.
3. Search for Austin Telco Federal Credit Union and select it from the list by clicking on it.
4. Enter your Online Banking Username and Password in the boxes given.

   Note: You can choose to have Quicken save your password if you'd like. This will require the creation of a Quicken Vault password. The Quicken Vault password is separate from your main Quicken password and your Online Banking password.
5. Click the **Connect** button to download your transactions into Quicken.

Quicken says there are transactions to accept:

1. Open the account register and select **Download Transactions** at the bottom of the register.

- If there are transactions listed, accept them to the register.
- If there are not any transactions listed, proceed with the next step.

2. Choose the **Tools** menu > **Online Center**.
3. Select the appropriate financial institution and account.
4. Select **Transactions**

- If transactions are listed, click **Compare to Register** and accept the transactions.
  Note: Compare to Register will display online payments to the initial screen. After accepting your online payments, click **Continue**, **Next**, or **Done** to see the rest of your downloaded transactions.
- If no transactions are listed or Compare to Register does not allow you to accept the transactions, you will need to contact Quicken support for further assistance.

Quicken says your financial institution password is incorrect:

If you're getting invalid password errors when you update your accounts, the Password Vault may contain incorrect information. The best way to correct this is to recreate the Password Vault. To do this, you will need to print a record of the stored passwords, delete the Password Vault, and then create it again.

Note: This can be caused by a recent change to your financial institution's password. If your password has not changed recently, try closing Quicken and reopening it. Sometimes a restart will fix an issue with invalid passwords.

Print the Password Vault

Note: This step is only necessary if you don't remember your passwords stored in the Password Vault. If you do not want to print all your passwords and/or you remember them, you can skip this section.

1. Choose the **Tools** menu > **Password Vault** > **Add or Edit Passwords** and enter your Password Vault password
2. Click **Print** and enter your Password Vault password, and then click OK.
3. Select the appropriate options in the Print dialog, and then click **OK** to print the Password Vault.

Delete the Password Vault

1. Choose the **Tools** menu > **Password Vault** > **Delete Vault and all Saved Passwords**.
2. Click **Yes** to the confirmation prompt.

Create the Password Vault

1. Choose the **Tools** menu > **Password Vault** > **Set up new Password Vault**.
2. Follow the on-screen prompts to create the Password Vault.

If you have not used Quicken since January 2015 or earlier:

In February 2015, Austin Telco FCU switched to a new Online Banking System. This change likely had you create a new password in addition to the creation of a Username. This change in your login information will directly affect any financial services such as Quicken. To update Quicken, you will need to deactivate your accounts and then reactivate them.

Task 1: Conversion Preparation

1. Select **File** > **Backup and Restore** > **Backup Quicken File**.
2. Choose to **Back up on my computer or hard drive**.
3. To help identify your latest backup, you can put a check next to **Add date to backup file name**. This is optional, but can come in handy if you need to restore back to a specific date.
4. You'll be able to see the location where your backup will be saved along with the name of the file that will be created (typically this is your Quicken file name followed by .QDF-backup). If you want to change the location of where you want the file saved, click **Change...** It's your choice where you want to save your backup.
5. Click **Back up Now** when you're ready.
6. You may or may not get a message that says your backup was successful.

Task 2: Deactivate Your Accounts

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the Account Details dialog, click on the **Online Services** tab.
4. Click **Deactivate**. Follow the prompts to confirm the deactivation.

   Note: If there are downloaded transactions waiting to be accepted, you will get an error message informing you of this. Make sure none of the accounts you are deactivating have these pending transactions before continuing.

5. Click the **General** tab.

6. Remove the financial institution name and account number. Click **OK** to close the window.
7. Repeat steps 2-6 for each account at Austin Telco FCU.

Task 3: Re-activate Your Account(s)

1. Log in to Austin Telco FCU and download your Quicken Web Connect file.

- When you first log into ATFCU Online Banking, scroll down to the bottom of your Quick History section. You will see a Downloads section with a link labeled Quicken.
- A dialog box will come up asking you to select the date range of which transactions you want to download. The left drop-down menu selects which share you are downloading, the right dropdown menu selects how you want to designate the transactions to be downloaded.
- Select the **Start Date** option to choose a specific date range.

  Note: Make sure the starting date of the range is after the last downloaded transaction for the account in Quicken. If there is any overlap you will get duplicate transactions.

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2. Once you have downloaded the file, make note of where it is saved. Then go back into Quicken and click **File** > **File Import** > **Web Connect File**.
3. If prompted for connectivity type, select **Web Connect**.
4. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select Link to an existing account and select the matching account in the drop-down menu.

   Important Note: Do not select **Create a New 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.
5. Repeat steps 2-4 for all your accounts.

Having a Different Issue?

If you need assistance with a different problem, you can look through Quicken's support information for instructions on dealing with various issues at the website below:

http://quicken.intuit.com/support/

If you need to contact Quicken Support to get live assistance from one of their representatives, you can find their contact information at this website:

http://www.quicken.com/contact-us

We recommend using live chat to reach one of their representatives faster without being put on hold. Simply choose your product from the drop-down menu on that page and follow the menus down until they connect you to a support representative.