

# Online Banking Web Connect to Direct Connect Conversion QUICKEN Essentials for Mac 2007® for NASA Federal Credit Union

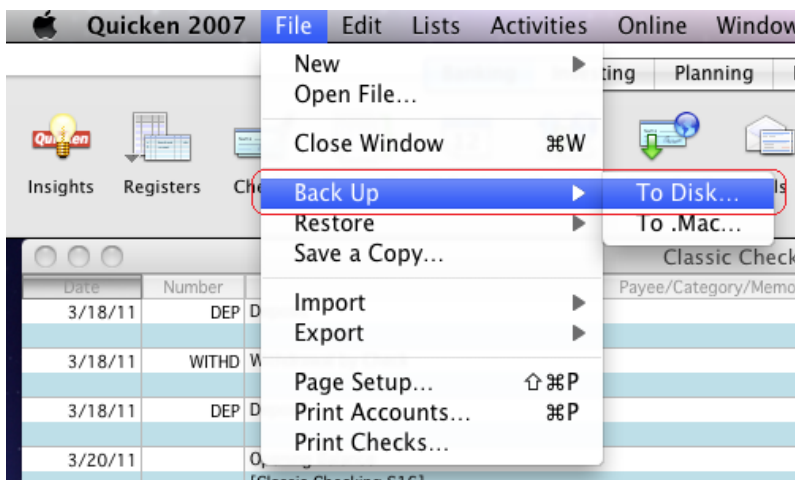


If you already use Quicken to upload your **NASA Federal Credit Union** account information from an eBranch download, you will need to modify your settings to take advantage of **NASA FCU Quicken Direct Connect** and ensure the smooth transition of your data. You will need your **NASA FCU eBranch Online Banking login credentials (account number and password)**.

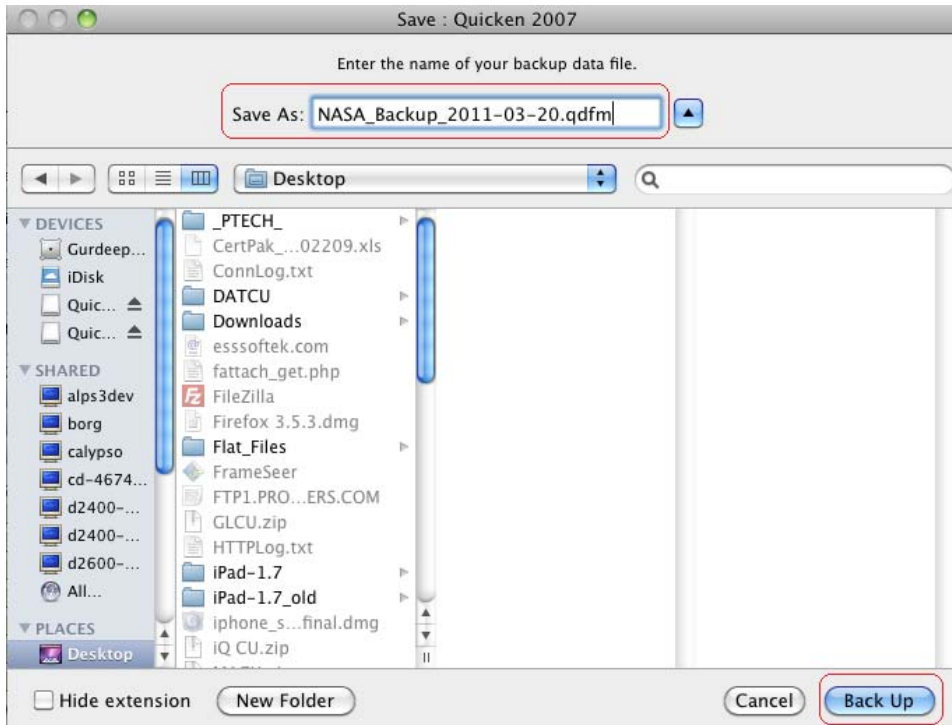
It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online banking service may stop functioning properly. This conversion should take 15–30 minutes.

## BACK UP YOUR CURRENT DATA

1. Click on **File** at the top tool bar → **Back Up** → **To Disk**.



2. Specify which file to back up and where you want the backup saved in the **Save As** dialog, and then click **Save**.

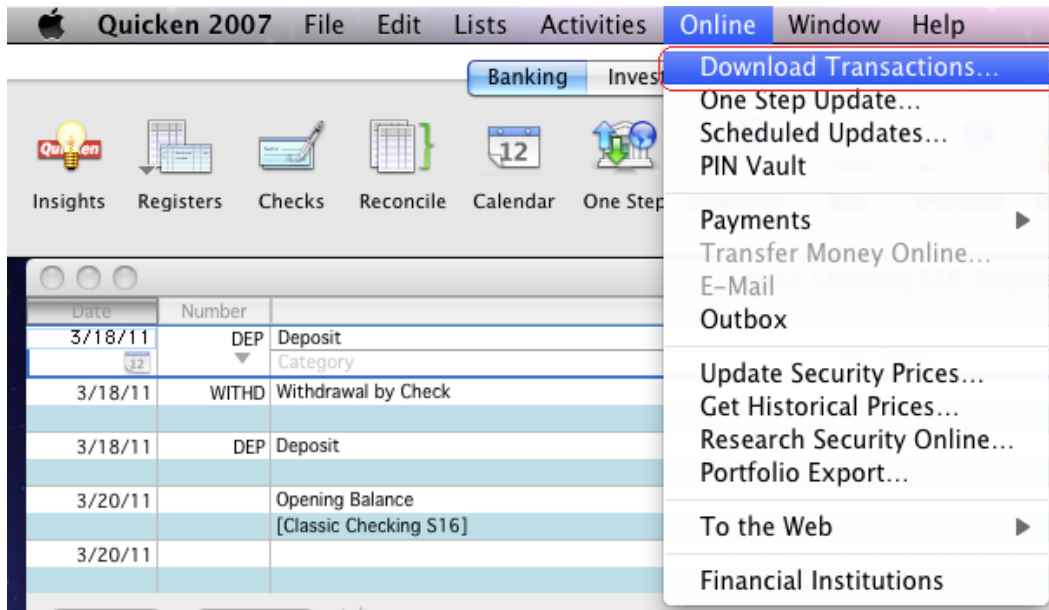


## DOWNLOAD THE LATEST QUICKEN UPDATE

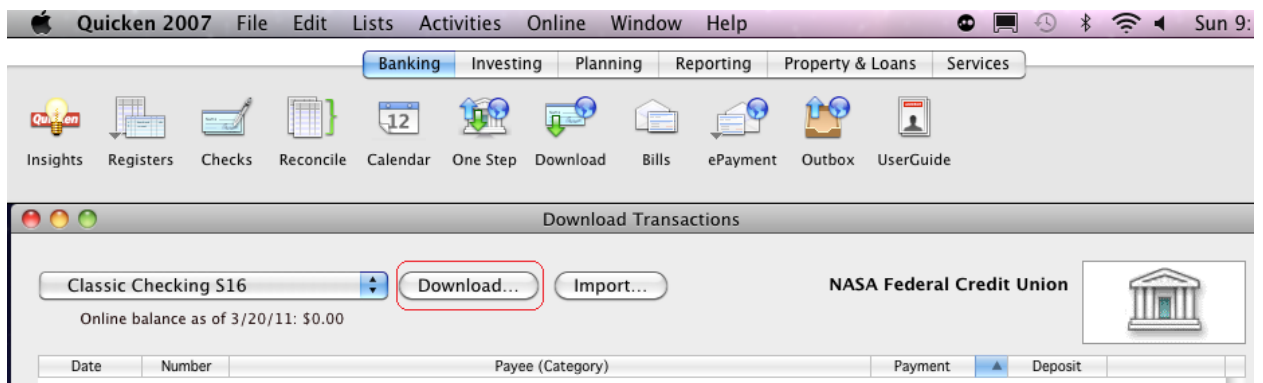
1. Click the **Quicken 2007** menu at the top tool bar and select **Check for Updates**.
2. If a software update is available, Quicken will prompt you to download the update.
3. Select the **Install Update** to proceed.
4. When the update is completed, close Quicken. Reopen Quicken.

# GET YOUR LATEST TRANSACTIONS

1. Select **Online** menu at the top tool bar and select **Download Transactions**.



2. In the **Download Transactions** screen, select your **NASA Federal Credit Union** account from the account drop-down list.
3. Click the **Download** button.



4. Log in to your **NASA Federal Credit Union account using eBranch online banking**. Download your transactions into Quicken.
5. Once the transactions are downloaded, accept all the transactions into your Quicken account register.
6. Repeat steps 1 through 5 for each **NASA Federal Credit Union** account (such as checking, savings, credit cards, and line of credit) that you use for online banking.



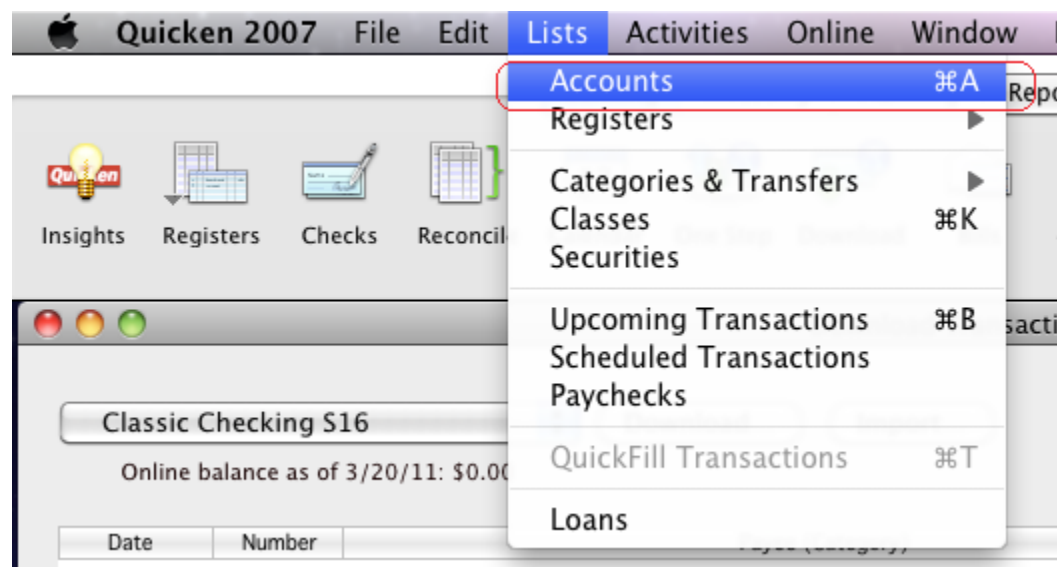
**Important:** You will not be able to proceed to the next section until you accept all transactions in the Downloaded Transactions tab.



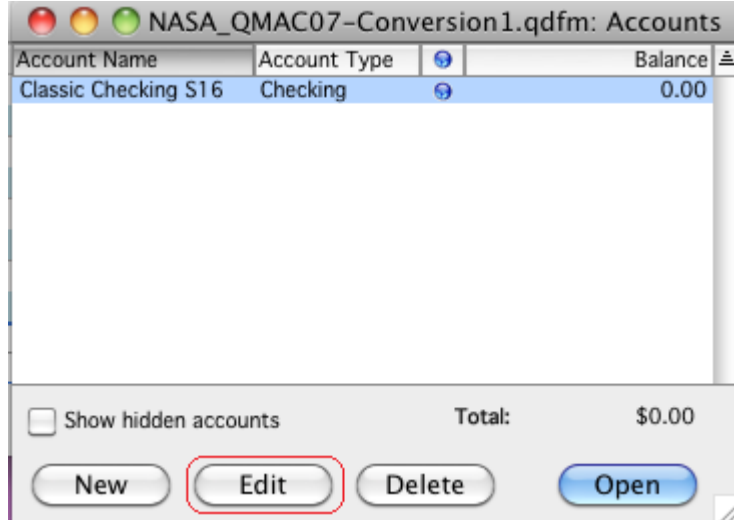
For help reconciling your account register, choose **Help** menu → **Quicken 2007 Help** → in the **Ask a Question** prompt, enter **Reconcile an Account**.

## DEACTIVATE YOUR ACCOUNT FROM WEB CONNECT

1. Select the **List** menu at the top tool bar and select **Accounts**.



2. In the Accounts List window, select the **NASA Federal Credit Union** account to be disabled for the Web Connect service.
3. Click the **Edit** button.



4. In the **Account Registry** page, select the **not enabled** option from the **Download Transactions** dropdown list.
5. Click **OK** to the **You are about to disable...** prompt.

Classic Checking S16: Register

Account Name: Classic Checking S16

Description:

Account Type: Checking

Credit Limit: 0.00

Tax Status:  Tax-deferred or tax-exempt

Show Account:  In lists  In toolbar

Notes:

Financial Institution: NASA Federal Credit Union

Customer ID: 1234

Routing Number: 255077833 9 digits

Account Number: 1234-S16

Download transactions: **not enabled** (selected), via web site, using direct connect

Pay bills online: not enabled

Customer ID:

Routing Number:

Account Number:

Cancel OK

6. Click **OK** to save your edits and to complete the deactivation process.



**Important: Repeat steps 1 through 6** for each **NASA Federal Credit Union** account (such as checking, savings, and line of credit) to deactivate the Web Connect service.

## REFRESH FINANCIAL INSTITUTION LIST

Before you set your accounts up for Direct Connect you will need to refresh the Financial Institution (FI) list within Quicken for Mac. Please follow the steps below.

1. Select the Quicken **Online** menu at the top of your screen, then select the **Financial Institutions** option.



2. Click the **Update List**.
3. Verify that **NASA Federal Credit Union AND NASA FCU – Direct Connect** both appear in the Financial Institution list.
4. Click **Quicken** → then re-open Quicken.

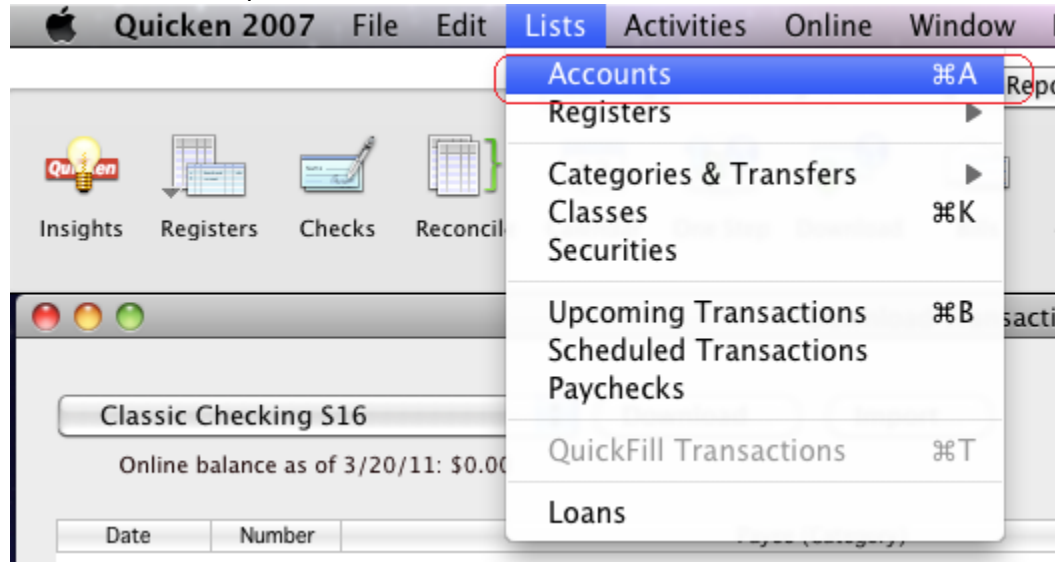


**Important:** If **NASA FCU – Direct Connect** does not appear in the Financial Institution list, please follow the following Quicken support steps to manually update the Financial Institution Directory:

<http://quicken.intuit.com/support/articles/online-services/financial-institutions/6991.html>

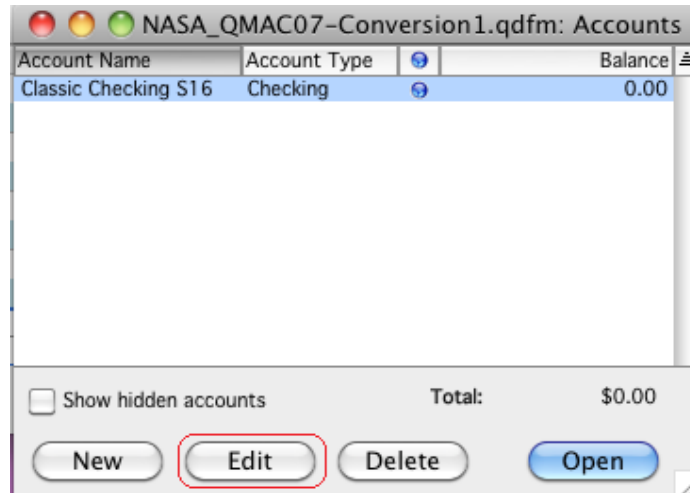
## ACTIVATE YOUR ACCOUNT(S) FOR DIRECT CONNECT

1. Select **List** menu at the top tool bar and select **Accounts**.





2. In the Accounts list window, select the NASA FCU account to be enabled for the Direct Connect service.
3. Click the **Edit** button.



4. In the **Account Registry** page, edit the **Account Number** field using the following instructions:
  - a. **For Share accounts (Checking, Savings and Money Markets)**, the new share account number will consist of your user account number + "S" for share + a colon ":" + 2-digit share ID.  
 For example, if your current **NASA Federal Credit Union** online banking share account number is "**1234-00**" → then your new account number is "**1234S:00**".
  - b. **For Loan accounts (Line of Credit, Auto Loan, Credit Card)**, the new loan account number will consist of consist of your user account number + "L" for loan + a colon ":" + 2-digit loan ID.  
 For example, if your current **NASA Federal Credit Union** online banking overdraft line of credit account number is "**1234-22**" → then your new account number is "**1234L:22**".

5. In the **Financial Institution:** dropdown list, select the **Change financial institution...** option.

Classic Checking S16: Register

Account Name: Classic Checking S16

Description:

Account Type: Checking

Credit Limit: 0.00

Tax Status:  Tax-deferred or tax-exempt

Show Account:  In lists  
 In toolbar

Notes:

Financial Institution: **Change financial institution...**

Customer ID: 1234

Routing Number: 255077833 9 digits

Account Number: 1234S:16

Download transactions: not enabled

Auto-Reconcile Options...

Pay bills online: not enabled

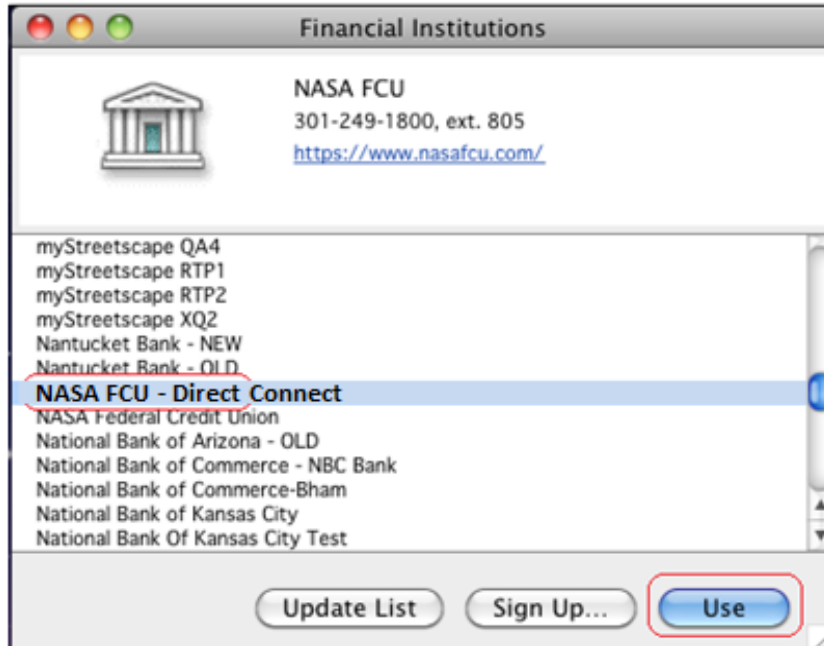
Customer ID:

Routing Number:

Account Number:

Cancel OK

6. In the **Financial Institutions** screen, select **NASA FCU – Direct Connect** from the list.
7. Click the **Use** button.



8. In the **Enter Customer ID and PIN** screen, enter your **NASA Federal Credit Union Online Banking customer ID (Account Number)** and **eBranch online banking Password**.
9. Click the **OK** button.

A screenshot of a dialog box titled "Enter Customer ID and PIN". It contains two input fields. The first field is labeled "Customer ID:" and contains the text "1234". The second field is labeled "PIN/Password:" and is currently empty. At the bottom of the dialog box are two buttons: "Cancel" and "OK". The "OK" button is highlighted with a blue border.

10. Follow the on-screen instruction and manually match each downloaded Quicken account to the appropriate NASA FCU account in the dropdown list.

11. Complete the remaining prompts to activate your account for Direct Connect.



**Important: Repeat steps 1 through 11** for each **NASA Federal Credit Union** account (such as checking, savings, and line of credit) to reactivate the Direct Connect service.



If you use the PIN Vault, choose **Help** menu → **Quicken 2007 Help** → in the **Ask a Question** prompt, enter **Editing a PIN Vault entry**.

**Thank you for making these important updates!**

As a result of this account conversion, you now have the convenience of downloading directly within Quicken rather than logging into your financial institution's Web site separately.

Now, each time you perform an account download, choose **Online** menu → **Download Transactions...** Click to select your account from the drop-down list, and click **Download**. Enter your new financial institution's PIN, and click **OK**.

Contact **NASA Federal Credit Union** for more information at [support@nasafcu.com](mailto:support@nasafcu.com) or call 301-249-1800, ext. 805. A member service representative will be available to assist you from 8:00 a.m. to 6:00 p.m. Monday – Friday, and from 9 a.m. to 2:00 p.m. on Saturday.