

Online Banking Web Connect to Direct Connect Conversion QUICKEN Essentials for Mac 2010® for NASA Federal Credit Union

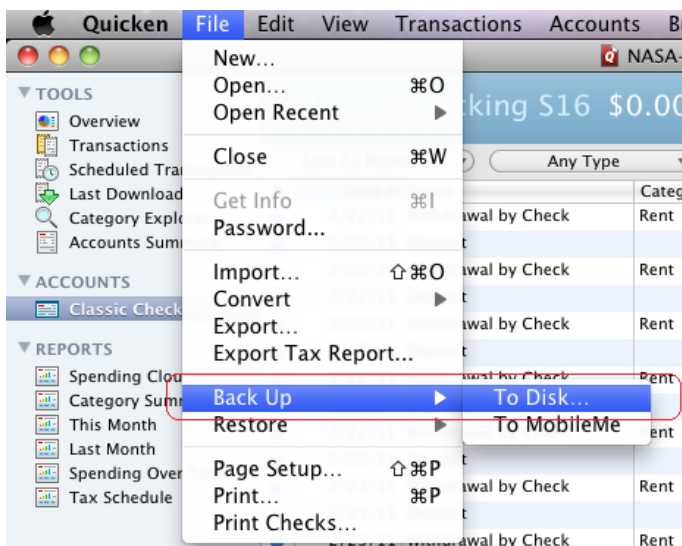


If you already use Quicken to upload your **NASA Federal Credit Union** account information from an eBranch download, you will need to modify your settings to take advantage of **NASA FCU Quicken Direct Connect** and ensure the smooth transition of your data. You will need your **NASA FCU eBranch Online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

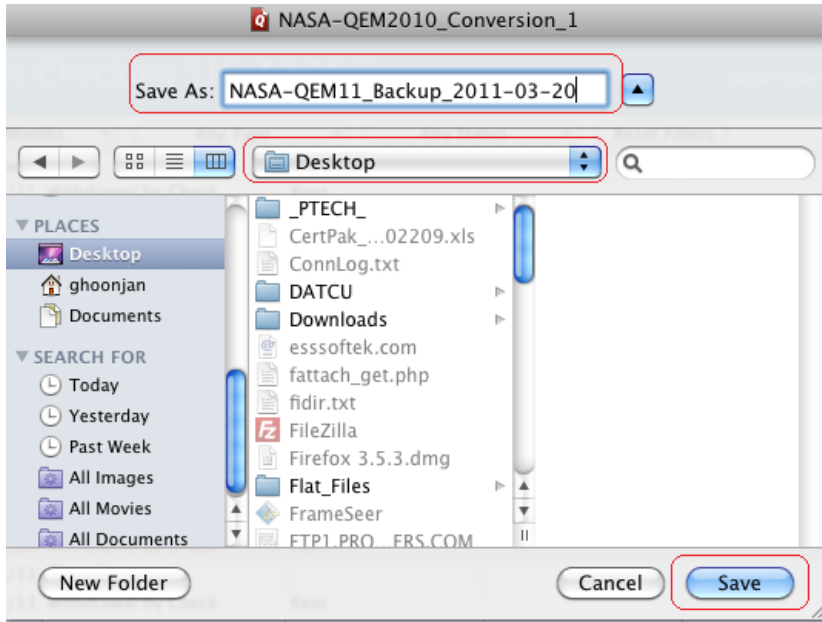
It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online banking service may stop functioning properly. This conversion should take 15–30 minutes.

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**.

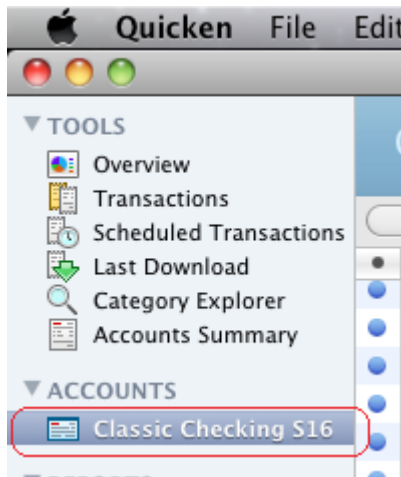


DOWNLOAD THE LATEST QUICKEN UPDATE

1. Click the **Quicken** icon at the top tool bar and select **Check for Updates**.
2. If a software update is available, Quicken will be 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 your **NASA Federal Credit Union** account to be updated.



2. Click the **Update** icon.



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



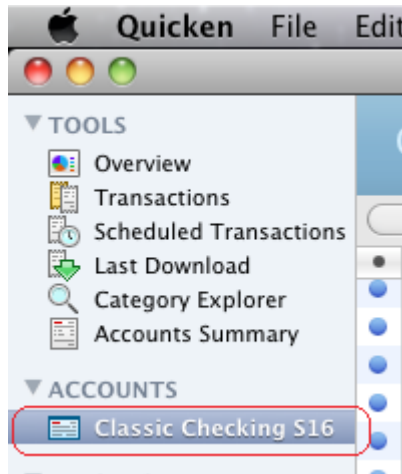
Important: You will not be able to proceed to the next section until you accept all transactions in the Downloaded Transactions tab.



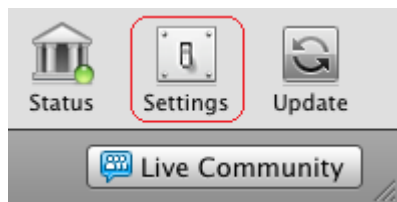
For help reconciling your account register, choose **Help** menu → **Search for reconcile** → select **Reconcile Account**.

DEACTIVATE YOUR ACCOUNT FROM WEB CONNECT

1. Select the **NASA Federal Credit Union** account to be disabled.



2. Click the **Settings** icon.

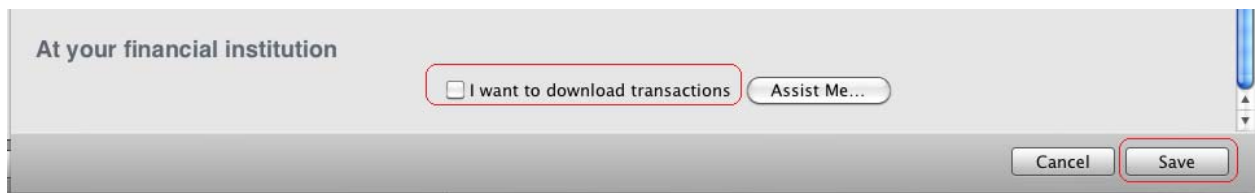


3. In the **At your financial institution** section of the **Settings** page, uncheck the **I want to download transactions** checkbox. This will disable the online banking feature for this account. If you return to this screen you will see the financial institution is no longer listed.



The screenshot shows a settings window titled "At your financial institution". It contains a checkbox labeled "I want to download transactions" which is currently checked. To the right of this checkbox is a button labeled "Assist Me...". Below the checkbox is a dropdown menu for "Region" set to "United States". Further down is a label "Financial Institution:" followed by a button labeled "List...". At the bottom right of the window are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a red box.

4. After you have made changes, click the **Save** button to complete the deactivate process.



The screenshot shows the same settings window as above, but the checkbox "I want to download transactions" is now unchecked. The "Save" button at the bottom right is highlighted with a red box.

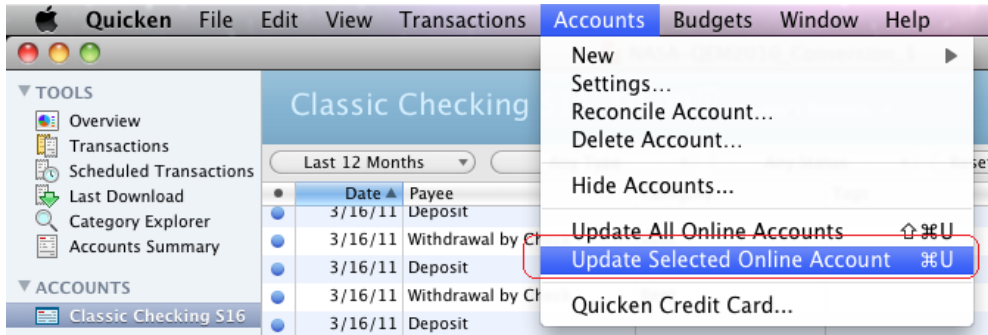


Important: Repeat steps 1 through 4 for each **NASA Federal Credit Union** account (such as checking, savings, and line of credit) to deactivate the Web Connect service.

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 Essential for Mac. Please follow the steps below.

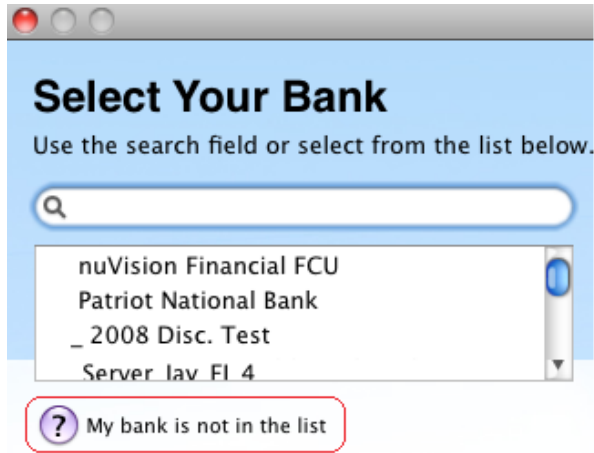
1. Select the **Account** menu at the top of your screen, then select the **Update the Selected Online Account** option.



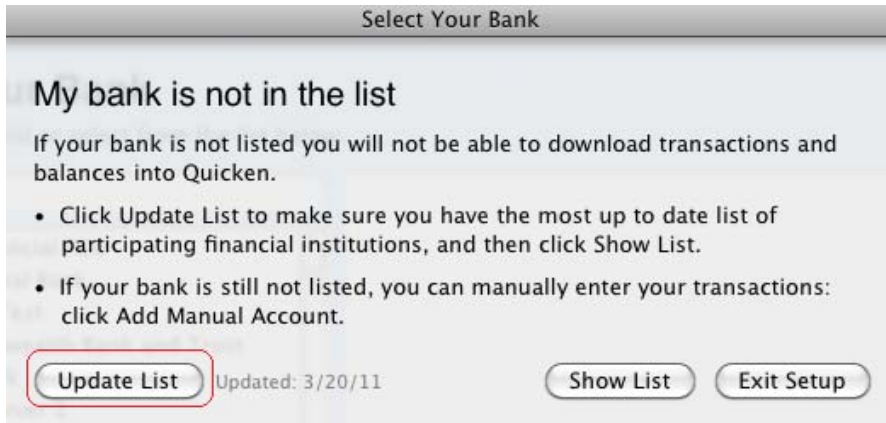
2. In the **At your financial institution** section of the **Settings** page, click on the **List** button.



3. In the **Select Your Bank** screen, click the **My bank is not in the list** option.



4. In the **Select Your Bank** screen, click the **Update List** button.



5. If the **Update List** button is unavailable, click the refresh button (circular arrow) to start the refresh process.



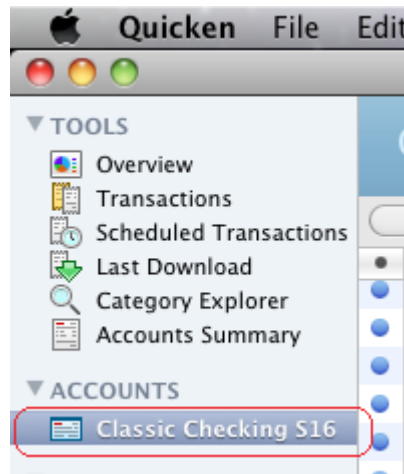
6. Click the **Check list again** when the update is complete.



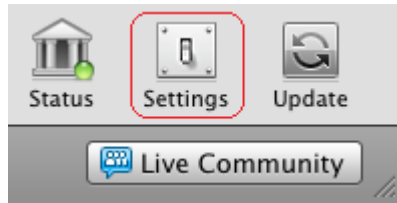
7. Verify that **NASA Federal Credit Union** and **NASA FCU – Direct Connect** appear in the Financial Institution list.
8. Click Quicken → then re-open Quicken.

ACTIVATE YOUR ACCOUNT(S) FOR DIRECT CONNECT

- Please be advised that the aggregation feature in Quicken Essentials for Mac 2010 known as Quicken Connect will not be active for 2-3 business days after the conversion is complete. Please use Web Connect to download your transaction until that time.
1. Select the **NASA Federal Credit Union** account to be enabled for the Direct Connect service.



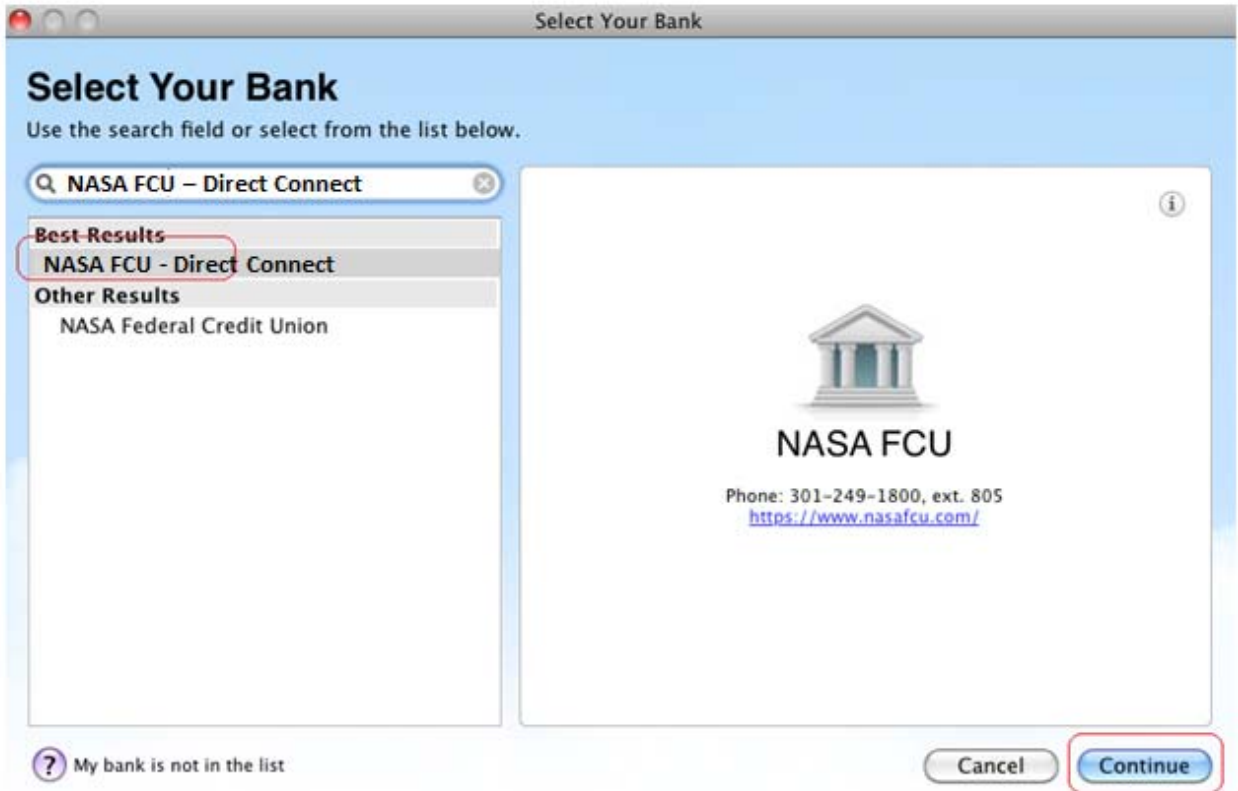
2. Click the **Settings** icon.



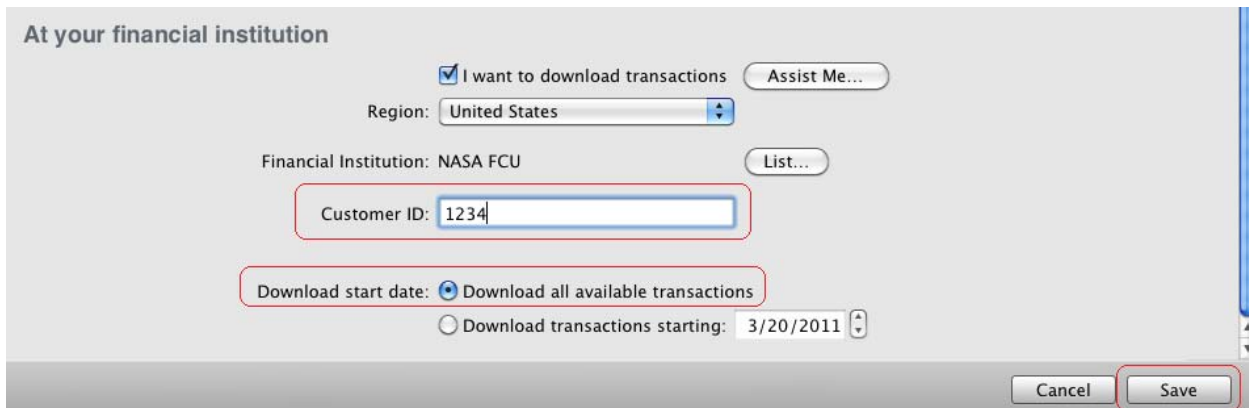
3. In the **At your financial institution** section of the **Settings** page, uncheck the **I want to download transactions** checkbox.
4. Click the **List** button to select **NASA FCU**.



5. In the **Select Your Bank** screen, select the **NASA FCU** from the list. Click the **Continue** button.



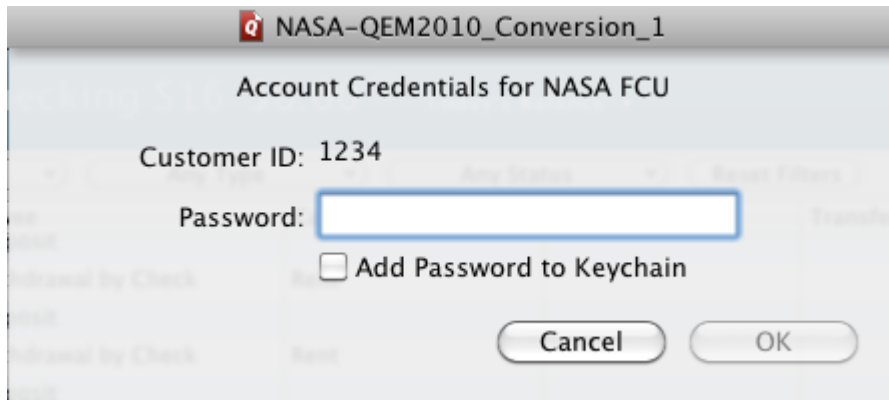
6. In the **At your financial institution** section of the **Settings** page, enter your **NASA Federal Credit Union Online Banking customer ID (Account Number)** and select the **Download all available transactions** radio button for the **Download start date**.
7. Click the **Save** button.



8. Click the **Update** icon.



9. In the Account Credentials for NASA FCU screen, enter your **NASA Federal Credit Union Online Banking Password**.
10. Click the **OK** button.



11. Follow the on-screen instruction and manually match each downloaded Quicken account to the appropriate **NASA Federal Credit Union** account in the drop-down list.
12. Complete the remaining prompts to activate your account for online banking.



Important: Repeat steps 1 through 12 for each **NASA Federal Credit Union** account (such as checking, savings, and line of credit) to reactivate the Direct Connect service.

Thank you for making these important updates!

Contact **NASA Federal Credit Union** for more information at 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.