Online Banking Web Connect to Direct Connect Conversion Quicken Windows 2009-2011 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. Choose **File** menu → **Backup**.

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

DOWNLOAD THE LATEST QUICKEN UPDATE

1. Click the **Update** icon on the Quicken toolbar.

2. Uncheck all boxes → **Update Now** in the **One Step Update Settings** dialog.

3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.

4. When the update is completed, close Quicken. Reopen Quicken.

GET YOUR LATEST TRANSACTIONS

1. Log in to retrieve your **NASA Federal Credit Union** account information, if available. Download your transactions into Quicken.

2. Once the transactions are downloaded, accept all the transactions into your Quicken account register.

3. Repeat steps 2 through 4 for each 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.

DEACTIVATE YOUR ACCOUNT FROM WEB CONNECT

1. Right-click on the applicable NASA Federal Credit Union account in the Quicken **Account List**. Select **Edit Account** from pop-up drop-down list.
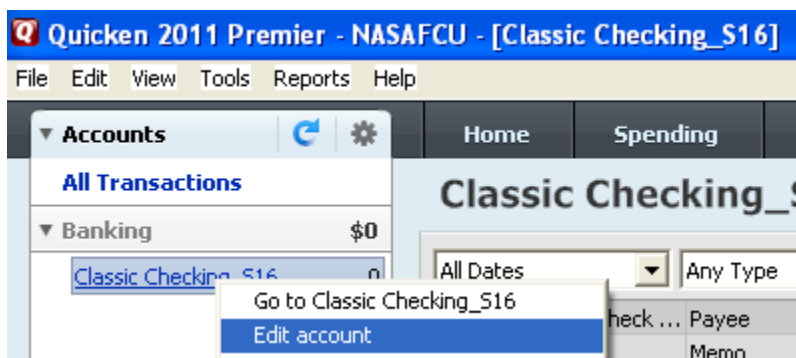
2. Click the **Online Services** tab ➔ In the **One Step Update** section, click the **Remove Connection** button.
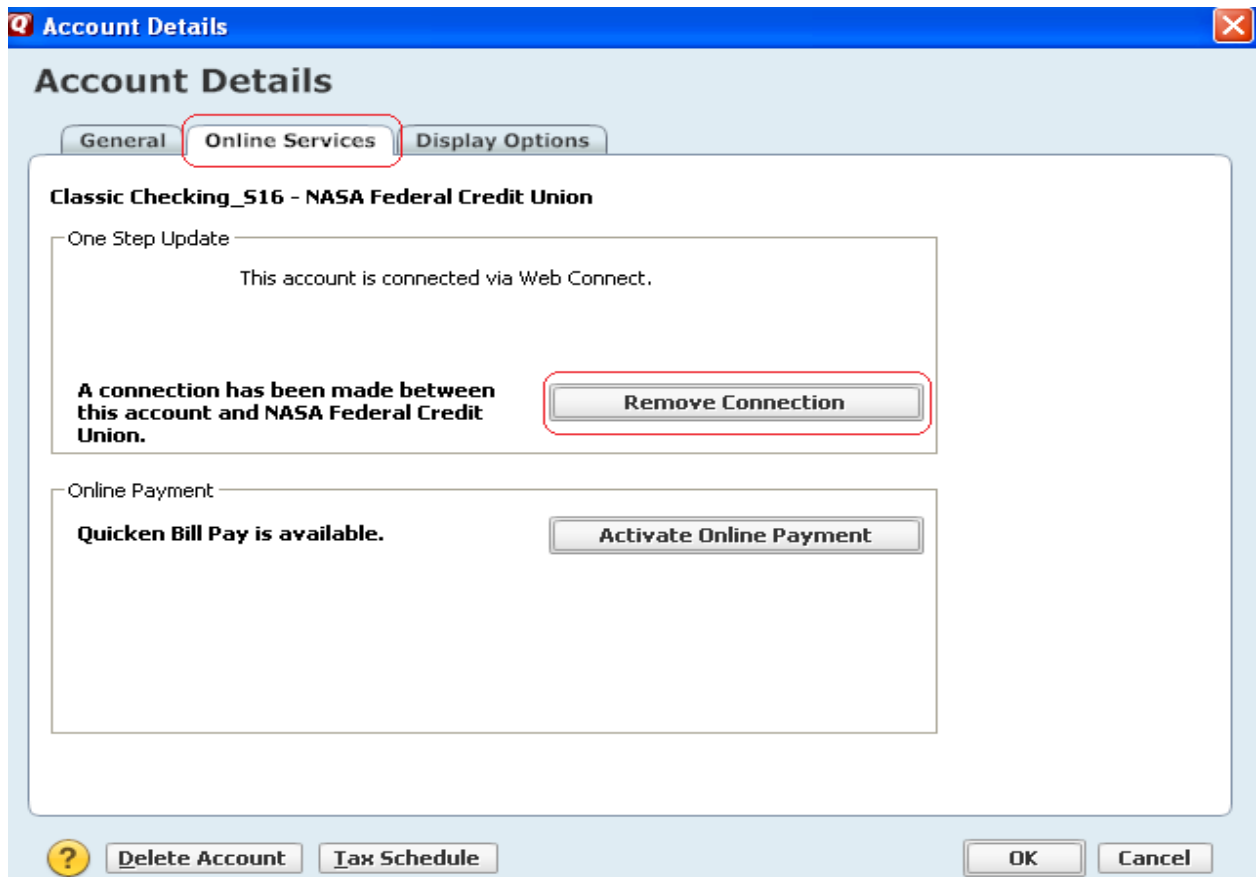
3. Quicken will prompt you to confirm deactivation ➔ click **Yes**.

4. Click the General Information tab ➔ In the **Financial Institution** field, type **NASA Federal Credit Union**.

5. In the **General Information** tab, edit the **Account Number** field per following instructions:
   a. **For Share accounts (Checking, Savings and Money Markets),** the new share account number will consist of your NASA FCU 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 NASA FCU 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**".

6. Click **OK** to close the **Account Details** dialog.

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, change the Financial Institution name and edit the Account Number to your NASA FCU account number.

Note: Verify that each of NASA Federal Credit Union account is deactivated for Web Connect service by choosing **Tools** menu → **Account List**. As each online account is deactivated, the word **Activated** or **Available** disappears for each account in the **Online Services** or **Transaction Download** column.

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. Please follow the steps below.

**Quicken for Windows 2008 and 2009**

- 2008 & 2009 – From the **Banking** menu, select **One Step Update** (click **Cancel** to bypass the **Password Vault**).
- Remove all the checks from the **Financial Institutions** and click on **Update Now**.
- Close Quicken → then re-open Quicken.

Quicken for Windows 2010 and 2011

- 2010 & 2011 – From the **Tools** menu, select **One Step Update** (click **Cancel** to bypass the **Password Vault**).
- Remove all the checks from the **Financial Institutions** and click on **Update Now**.
- Close Quicken → then re-open Quicken.

ACTIVATE YOUR ACCOUNT(S) FOR DIRECT CONNECT

1. Right-click on applicable **NASA FCU** account from the Quicken **Account List** → select **Edit** account from the pop-up drop-down menu.
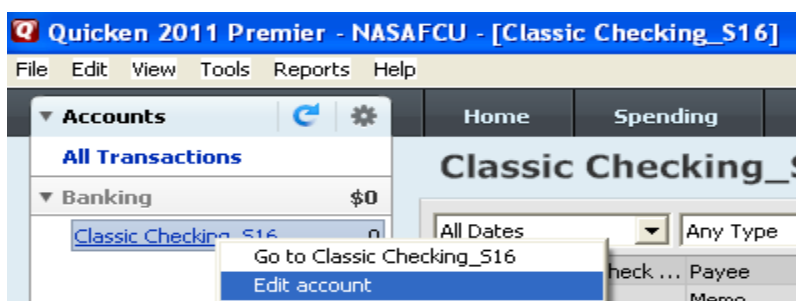
2. Click the **Online Services** tab. In the **One Step Update** section, it will state the connection method is a Manual account → click **Activate One Step Update**.
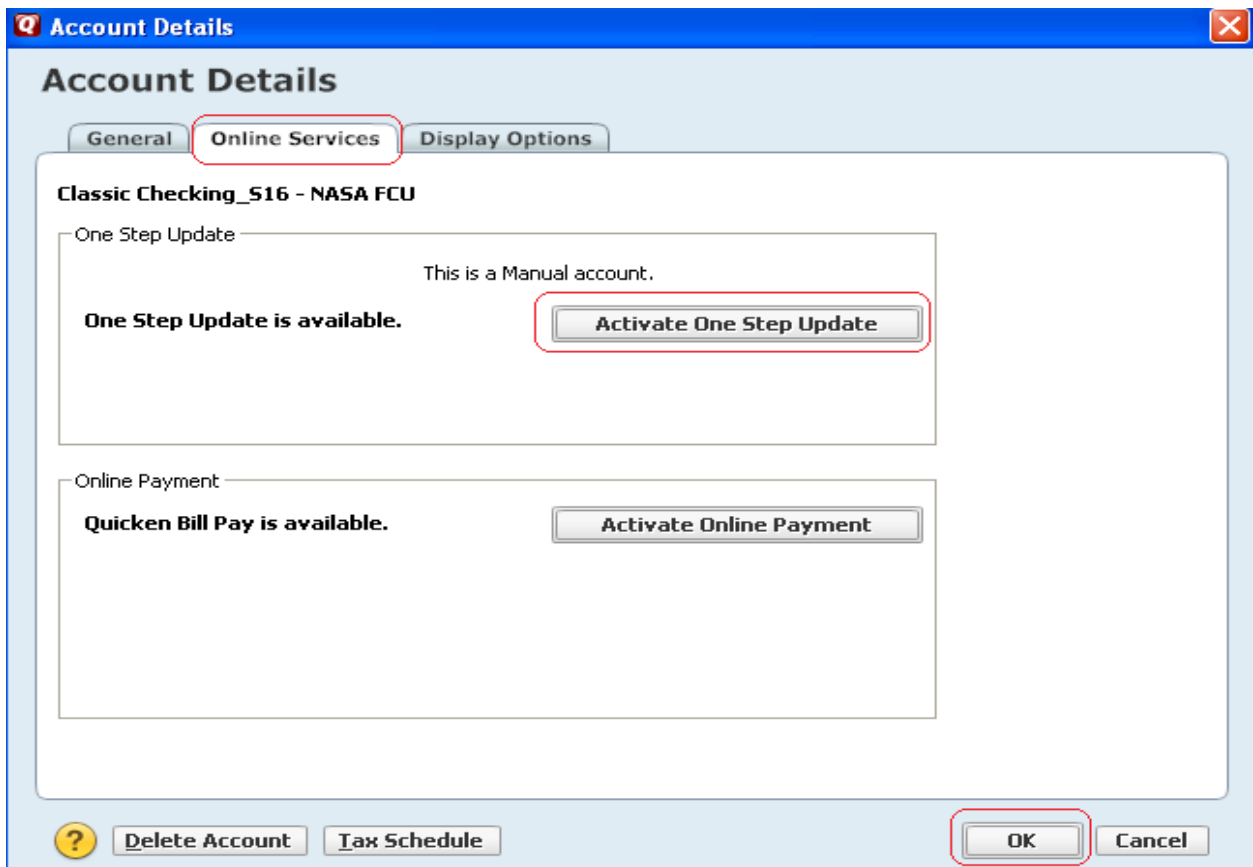
3. After selection, click **OK**.

4. 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.

5. Complete the remaining prompts to activate your account for online banking.

Note: If **Activate One Step Update** in the **One Step Update** area is missing and the "**One Step update is not available**" message appears in its place, please see **FAQ** below.

1. Follow the **Account Setup** to activate your account for online banking. If you have more than one account, then match each Quicken account to the appropriate account in the drop-down list, and complete the remaining prompts.

2. Verify your online account list is accurate and that your accounts are activated by choosing the **Tools menu**>**Account List**. Then verify that the word **Activated** or **Available**

appears in the **Online Services** or **Transaction Download** column for all of your **NASA FCU** accounts.

FAQ: If **Activate One Step Update** in the **One Step Update** area is unavailable and the "**One Step update is not available**" message appears in the screen, please follow below steps:

a.   Close the **Account Details** window.
b.   Click on **Add Account** button on the bottom left screen.
c.   On the **Quicken Account Setup** process window where Quicken prompts, "What is the financial institution for this account?" enter **NASA FCU – Direct Connect**. Click **Next**.
d.   When Quicken prompts, "How do you want to set up your **NASA FCU** account(s)?" select **Yes** radio button.
e.   When Quicken prompts, "Log in to setup **NASA FCU** account(s) in Quicken", enter your online banking member ID (Member Number) and password.
f.   After the account is successfully downloaded, Quicken will display a list of downloaded account, which allows user to match to the existing account in the **Cash Flow Center**.

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, and complete the remaining prompts. If you have more than one account, then match each Quicken account to the appropriate account in the drop-down list, and complete the remaining prompts.

IMPORTANT: The download may include transaction history that already exists in your Quicken account register.

If you are successful in activating your **NASA FCU** accounts, on your initial statement download after you have activated your **NASA FCU** accounts, you may receive duplicate transaction history downloaded that already exists in your Quicken account registry.

This issue usually occurs ONLY when you download transactions for the first time after **NASA Federal Credit Union** makes a system conversion.
To resolve this issue, you need to delete the original transaction and keep the most recently downloaded transaction:

a.   Locate the original transaction in the register and make note of its status (**R, C**, or blank) in the **Clr** column. If you reconcile your accounts regularly, the transaction status most likely shows as **R** (Reconciled).
b.   Delete the original transaction:
    a.   In the register, select the transaction.
    Note: In Quicken Windows, you may select multiple transactions.

b. Click **Edit**, and then choose **Delete Transaction**.
c. Click **Yes** to the confirmation message.

c. Locate the duplicate transaction that was downloaded. Its status shows as **C**.
d. Change the status to match the transaction that was deleted by clicking in the **Clr** column of the duplicate transaction.
e. Click **Enter** to save any changes to the transaction.
f. Repeat these steps for each set of duplicate transactions.

Thank you for making these important updates!

As a result of this account conversion, you now have the convenience of downloading directly within Quicken. Now, each time you perform an account download, you'll do a **One Step Update** rather than a Web site download. Choose **Online** menu → **One Step Update**. Click to select the download options you want, enter your financial institution's online banking password, and click **Update Now**.

Your **Direct Connect** accounts may also offer new functionality and services such as online transfers.

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.