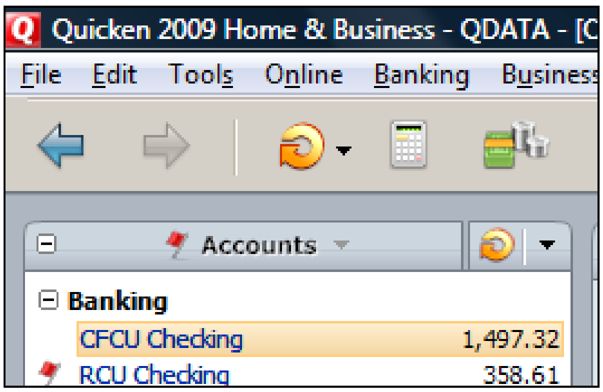
Home Banking Conversion: Update CFCU Accounts in Quicken

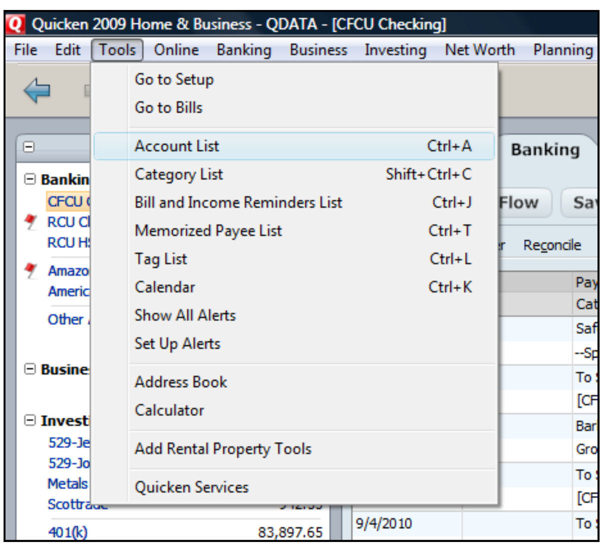
The conversion process for automatic updating in Quicken consists of two steps. First, each CFCU online account must be deselected in Quicken. Second, each CFCU online account must then be selected once again in Quicken. The following describes the process for a member using Quicken 2009. This process is identical for that used for Quicken 2010 as well.

Deselection process

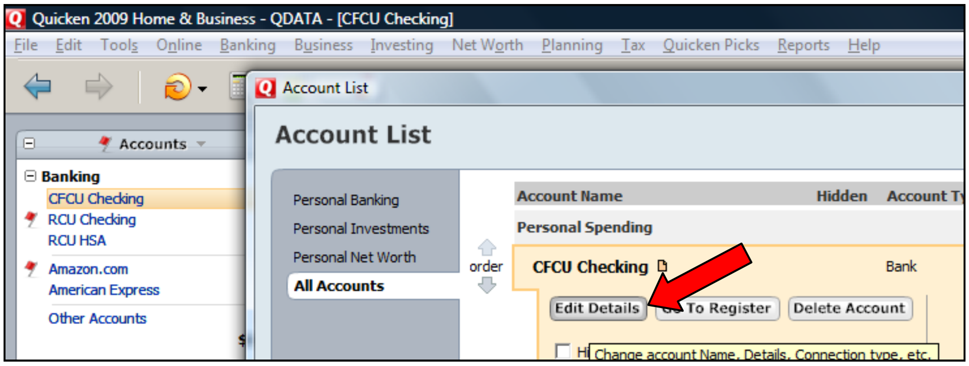
1. Open Quicken, select CFCU account



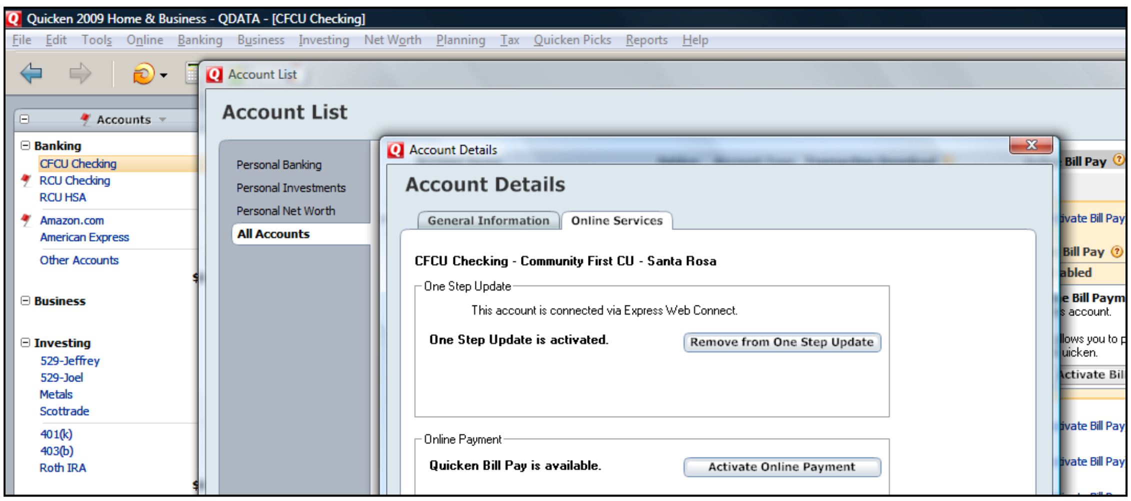
2. Choose **Tools** menu → **Account List**



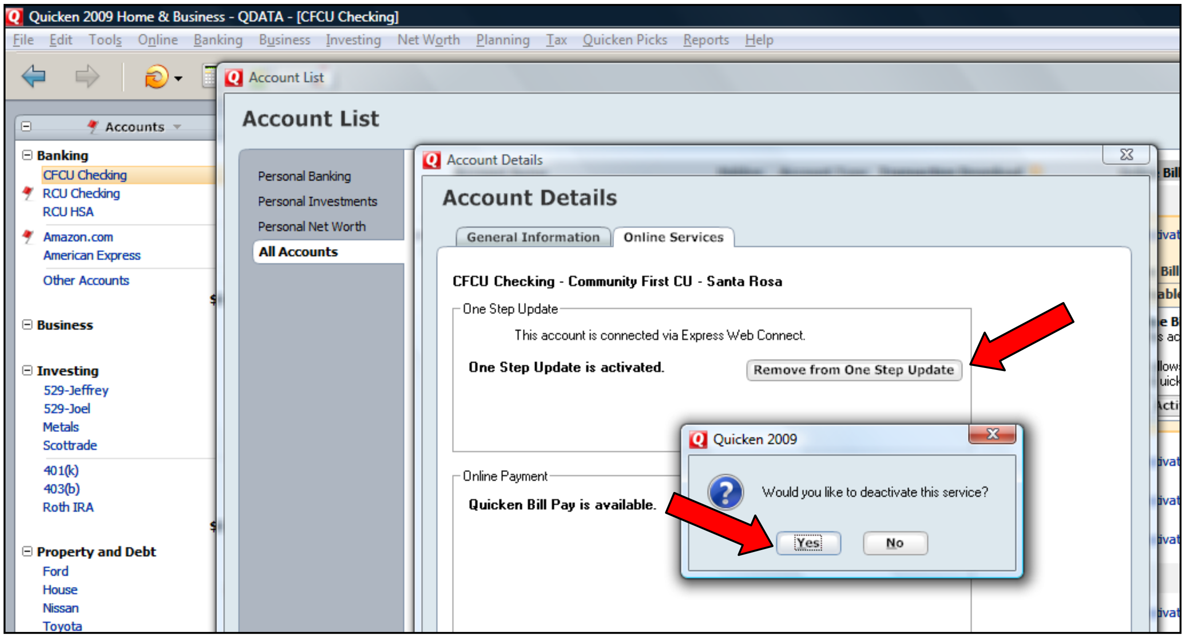
3. Click **Edit Details**



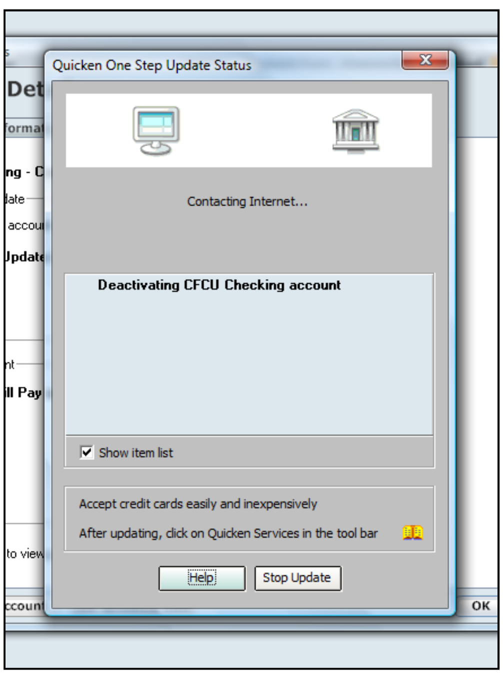
4. Select **Online Services** tab



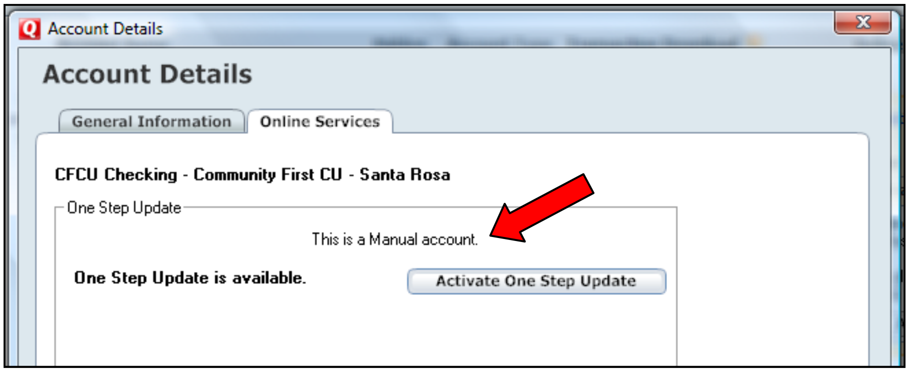
5. Click **Remove from One Step Update.** Click **Yes** on **"**Would you like to deactivate this service?"



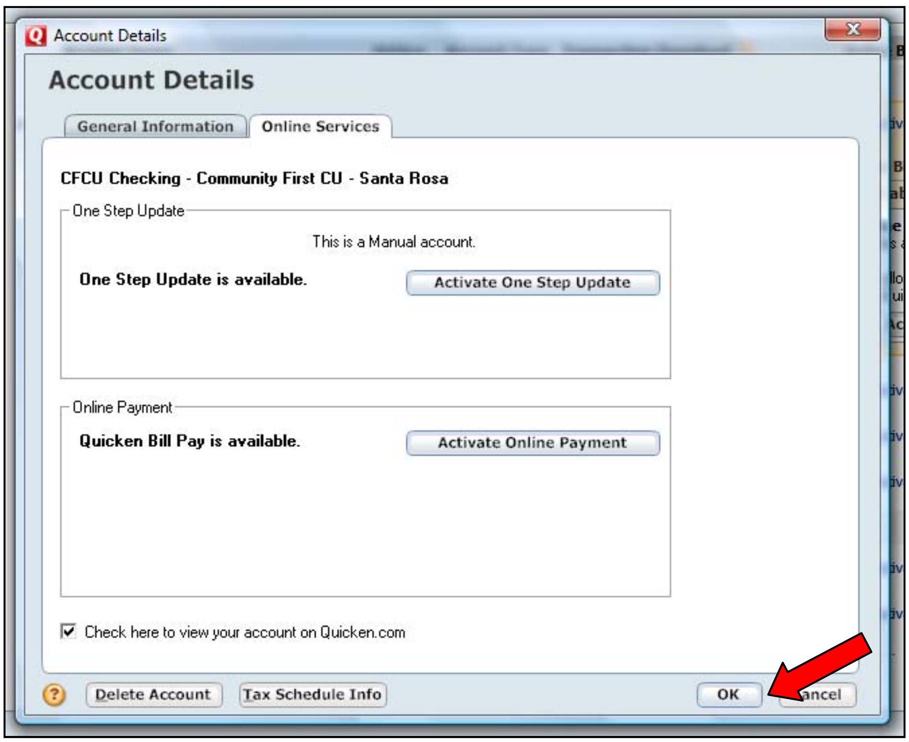
6. Quicken will display a message such as the following: "Deactivating CFCU Checking Account (or whatever the member has named the checking account in Quicken).



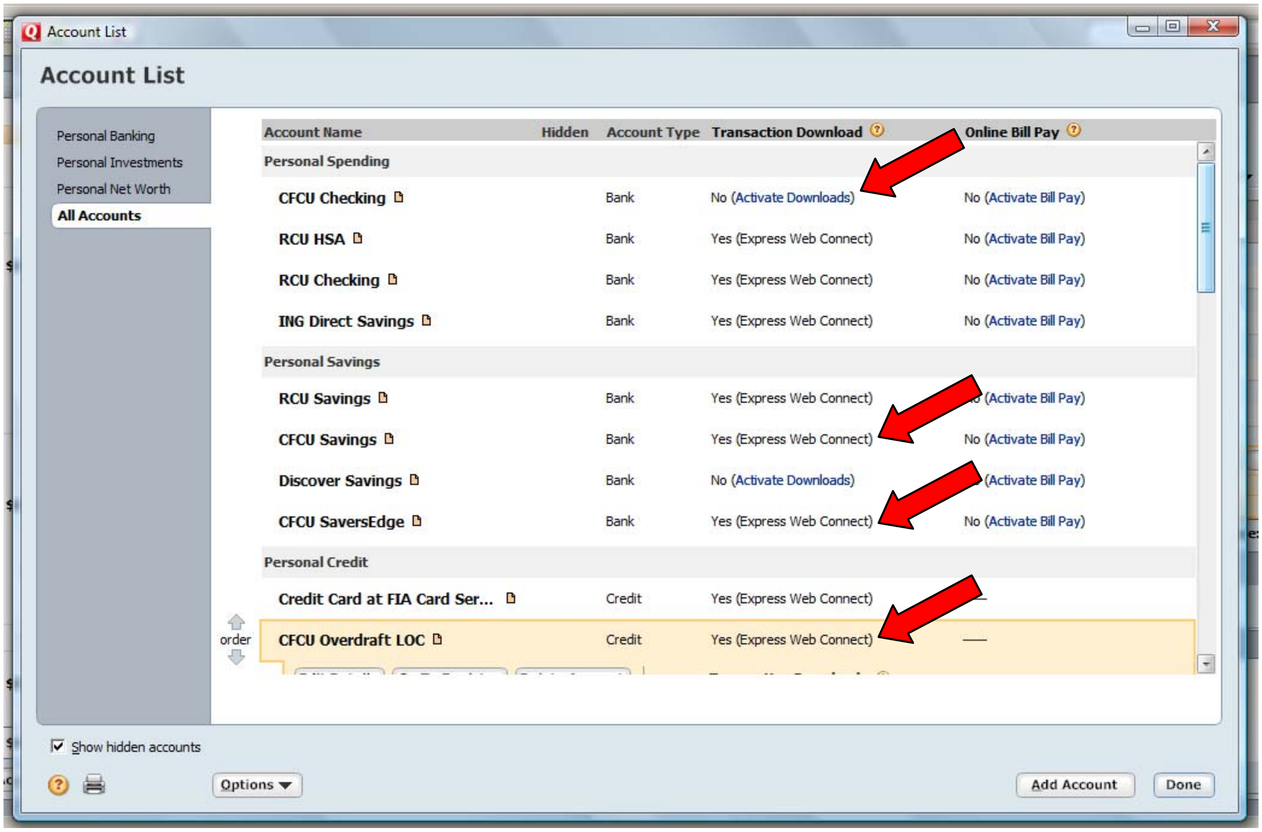
7. The One Step Update status will indicate a change from Web Connect to Manual update status.



8. Click **OK** to save change.

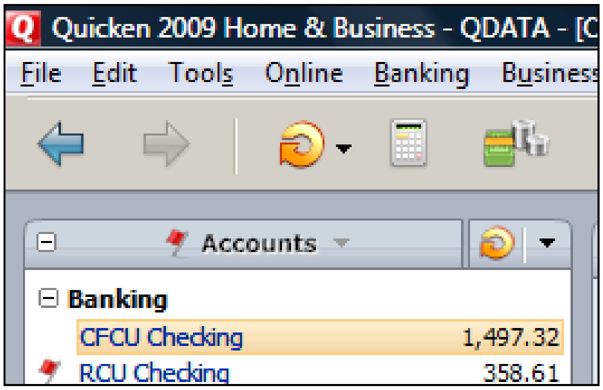


9. Repeat steps **1** through **8** for each CFCU online account (such as checking, savings, HELOC, and automobile loan). As each online account is disabled, its Transaction Download status in the Account List will display a status such as “No(Activate Downloads)” under the Transaction Download column. In the example below, the member has deactivated his checking account. Next, he needs to deactivate his savings accounts and his line of credit loan account.

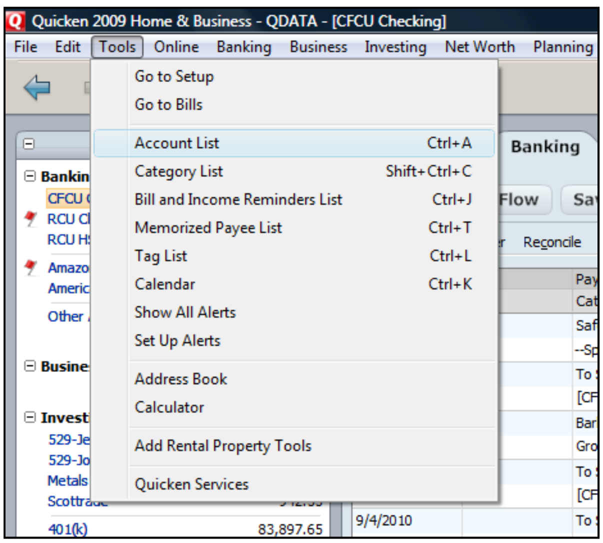


Selection Process

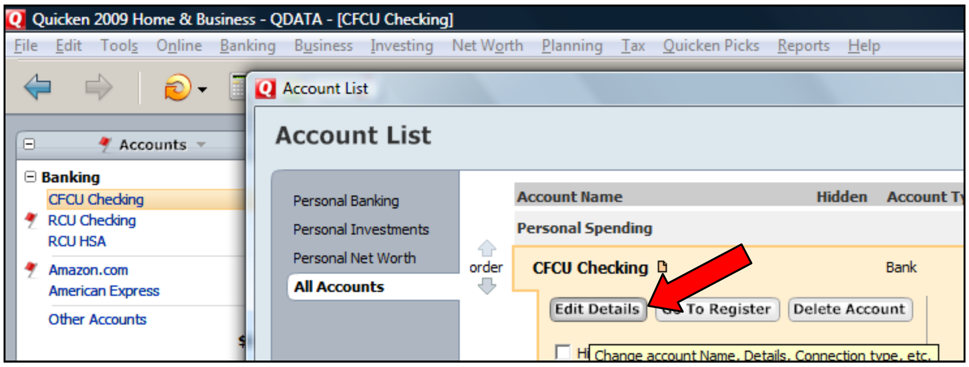
1. Open Quicken, select CFCU account



2. Choose **Tools** menu → **Account List**

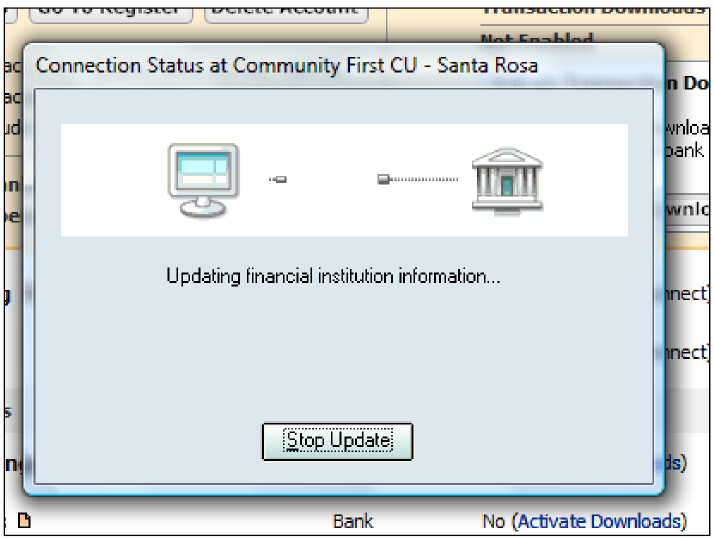


3. Click **Edit Details**

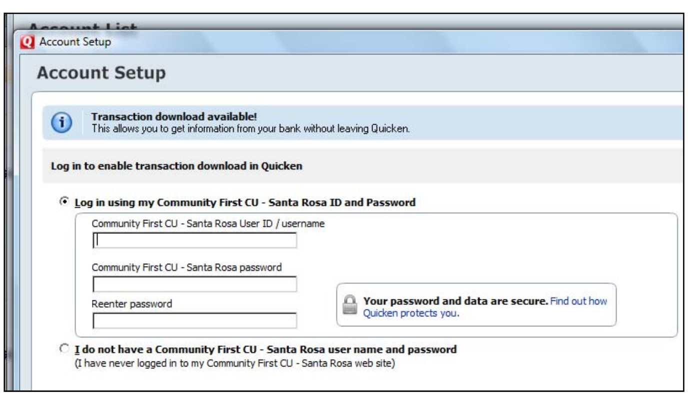


4. Select **Online Services** tab. Click **Activate One Step Update**.

5. Quicken will update financial institution status. This will take several minutes.

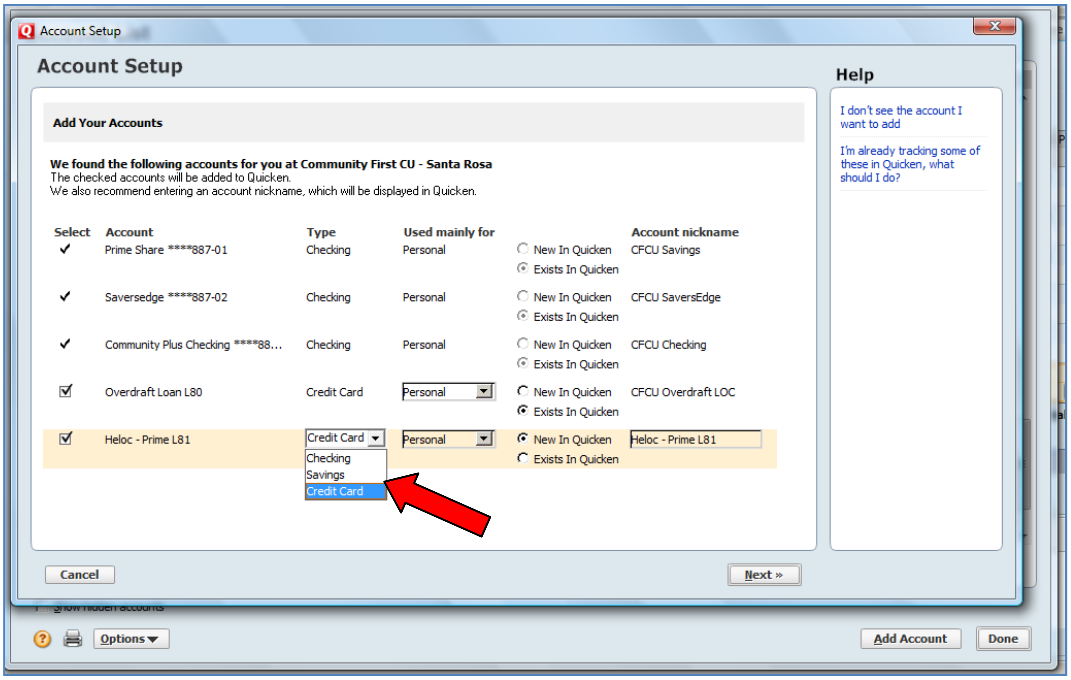


6. Quicken will indicate that transaction download is available, and prompt member to enter CFCU account ID and password. ID is CFCU account number, password is existing CFCU home banking account number.

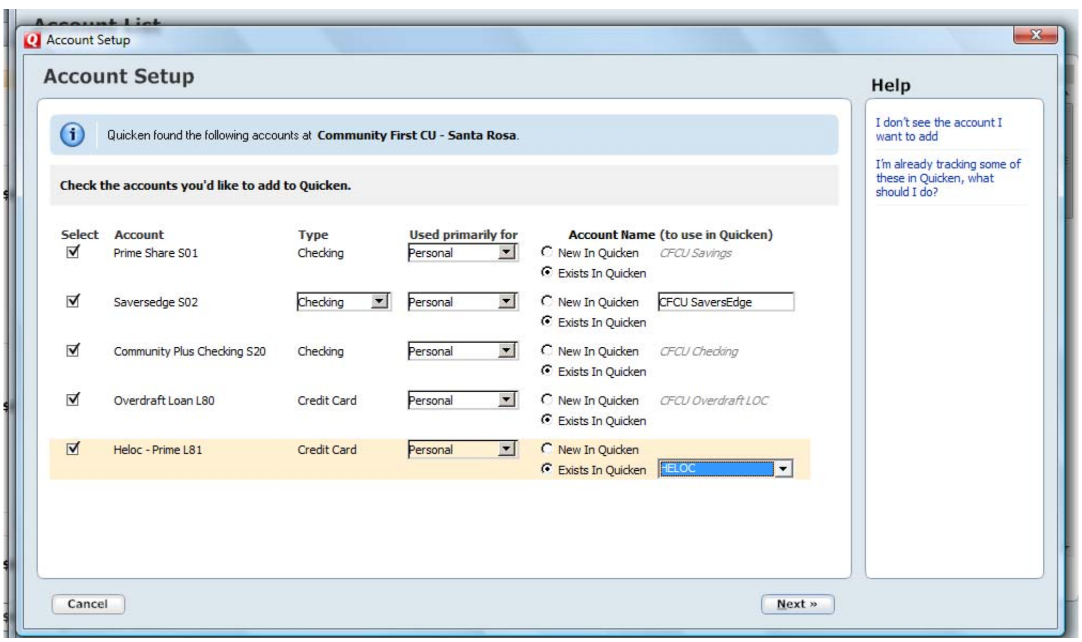


7. Quicken will indicate account information is being requested.

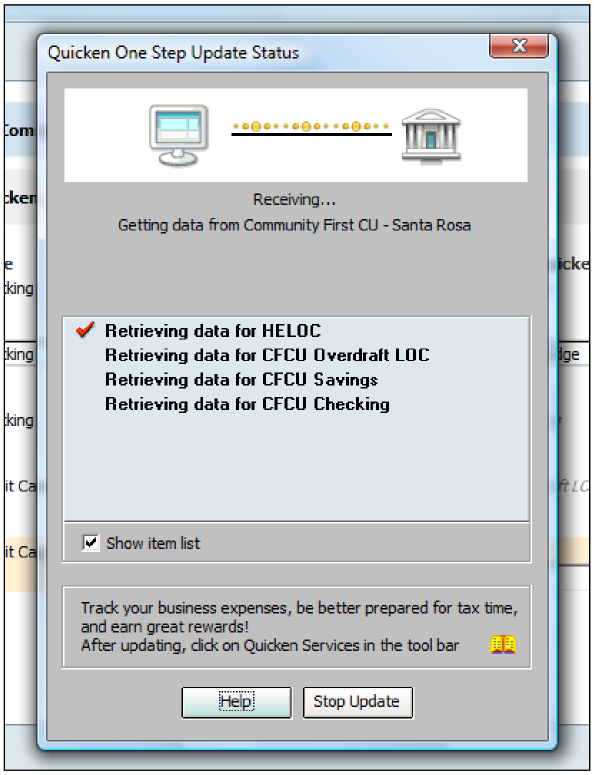
8. Quicken will indicate accounts available for download. Member should select **Exists in Quicken** radio button for each account currently existing in Quicken. If an account does not exist in Quicken, member may set one up here. For CFCU line of credit accounts of any type, select **Credit Card** in the "Type" drop-down menu.



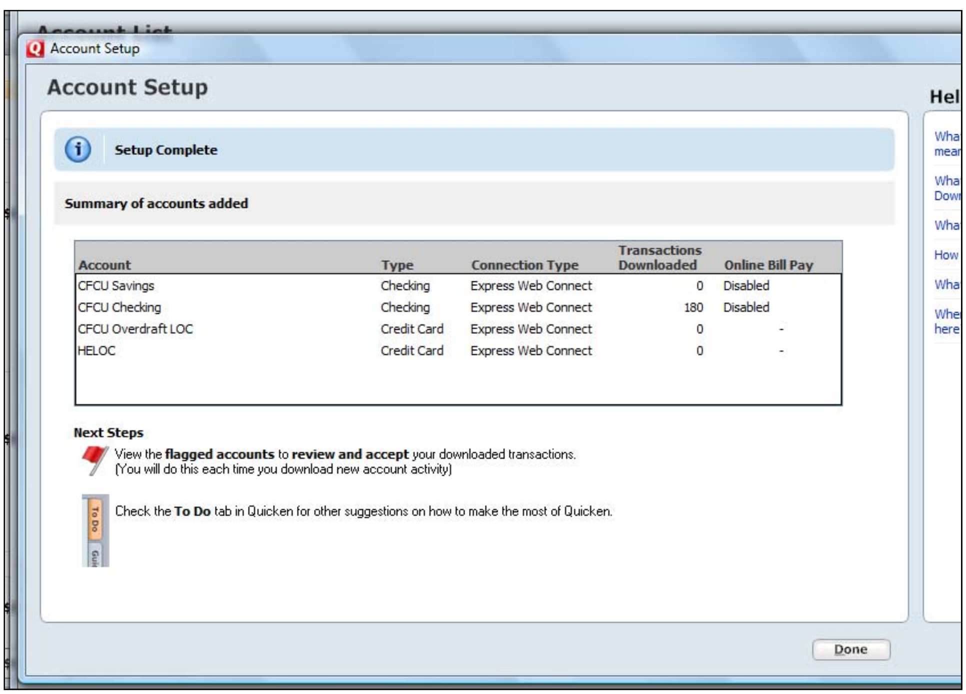
9. When all CFCU accounts are selected, click **Next**.



10. Quicken indicates status as it downloads account data from CFCU.

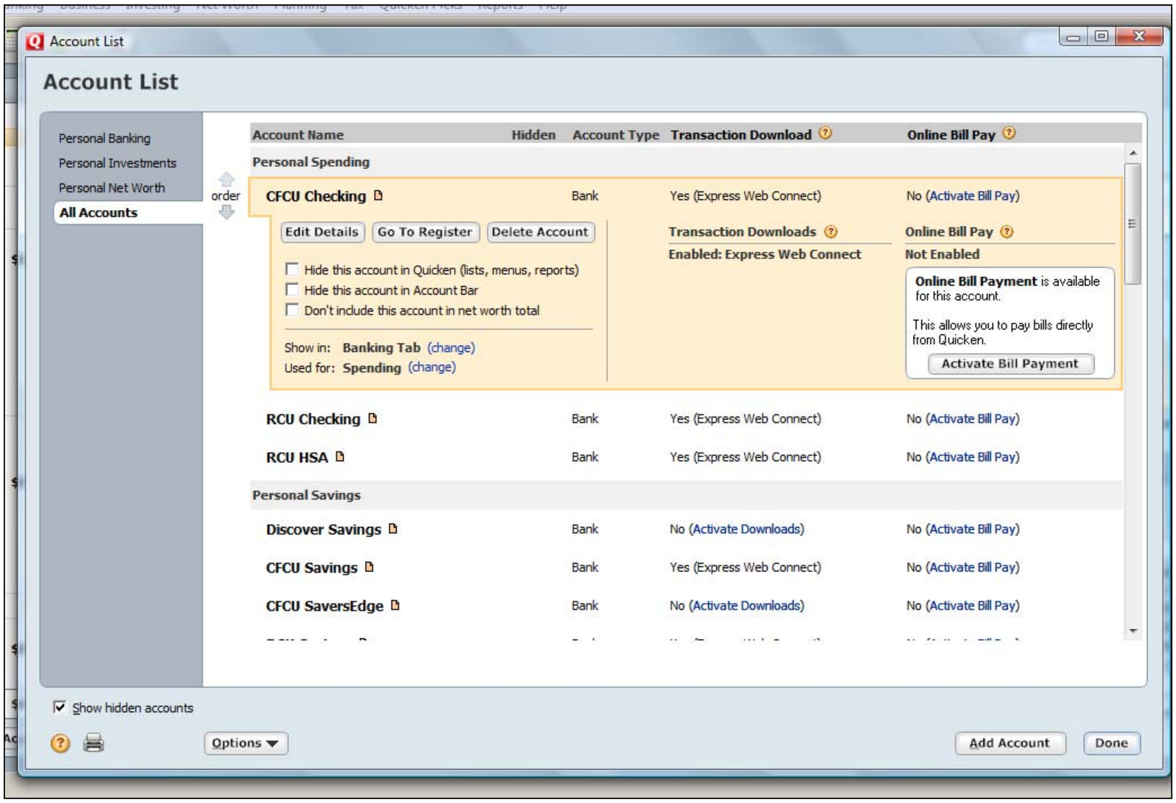


11. Quicken indicates accounts enabled for CFCU Home Banking access as follows:



12. Click **Done** to complete.

13. In the Account List, under Transaction Download column, status indicates Yes(Express Web Connect) for each CFCU account enabled. If a CFCU account was missed, perform steps 1-12 for that account again.



Click **Done** to complete.

EXTREME CAUTION! Member should accept only new transactions that do not already appear in the register. Should the member accept all transactions, duplicate transactions will be recorded, and the register will be out of balance. It will be necessary to reconcile.