Direct Connect Conversion Instructions
Quicken Essentials for Mac 2010

As Educational Employees Credit Union completes its Online Access Home Banking conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online service may stop functioning properly. This conversion should take 15-20 minutes.

Login to the New Online Access System

First-Time Login Instructions (if you have already logged into the new system, skip to Back-Up Your Data)

1. Go to www.myEECU.org and click the Online Access Login button.

2. Enter your User ID (account number) and the first-time password that was mailed to you.

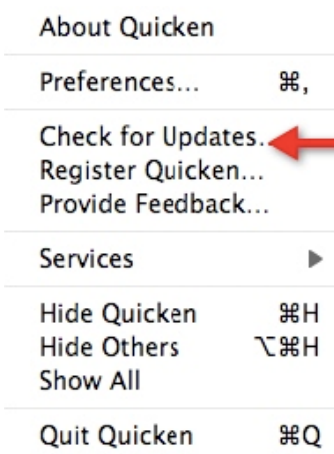3. Follow the on-screen prompts to complete the login process.

Back-Up Your Data

1. Click on the File menu → Back Up → To Disk

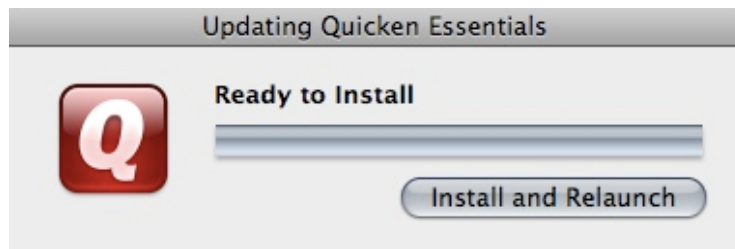2. Choose a file name and location → click Save

1
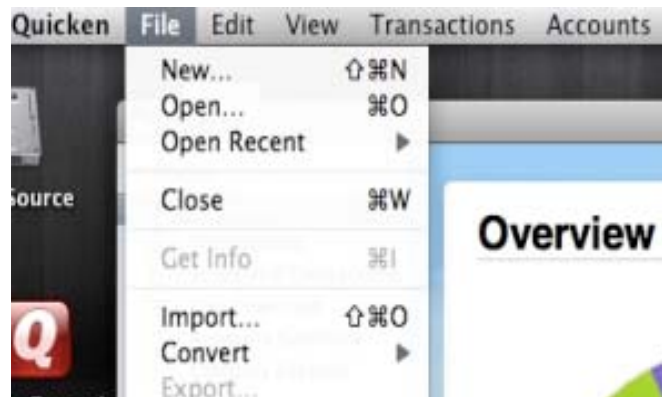
Download the Latest Quicken® Update

1. Click on the Quicken menu the top tool bar and select Check for Updates.

2. If a software update is available, you will be prompted to download the update.

Complete the Registration Process

1. Go to www.myEECU.org and click the Online Access Upgrade – Quicken Registration link on the home page. Or, type the following link in your browser window: http://www.myeecu.org/onlineserv/OFX/OFXRegister.cgi

2. In the User Information section, enter your EECU account number (NOT your new Online Access User ID) and the new password you created in the new Online Access system.

3. Enter your name and e-mail address in the registration form.

4. Select a Quicken password that meets the requirements.

5. Verify your registration information and click Confirm.

Deactivate Your Accounts

1. Select the account you want to deactivate →click Settings.
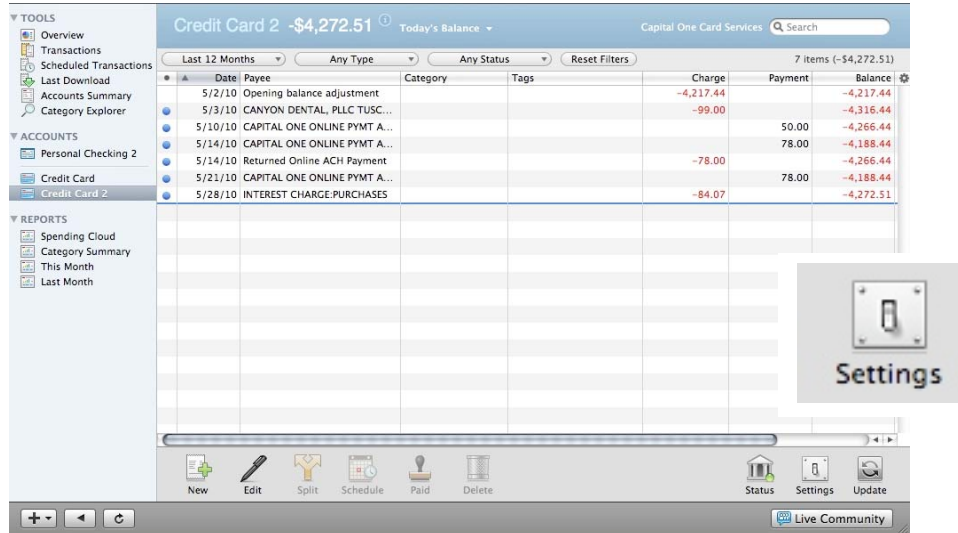
2. In the "**At your financial institution**" section of the settings page, uncheck the "I want to download transactions" box. This will deactivate the online banking feature for this account. If you return to this screen you will see the financial institution is no longer listed.
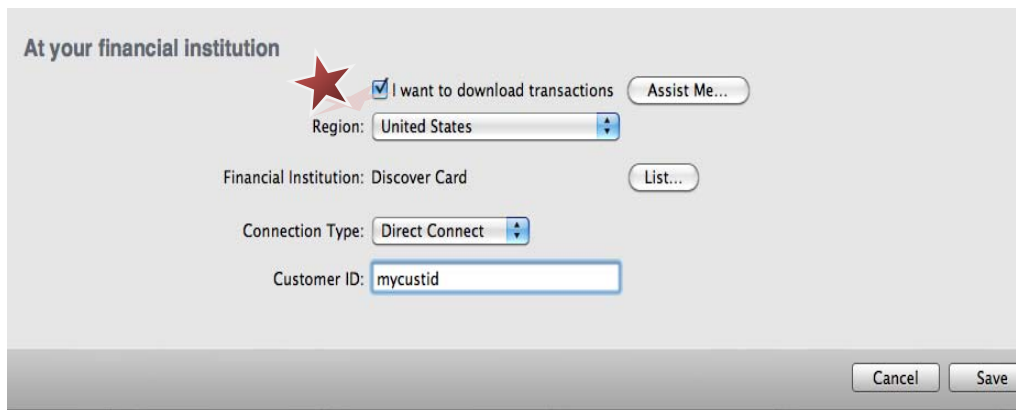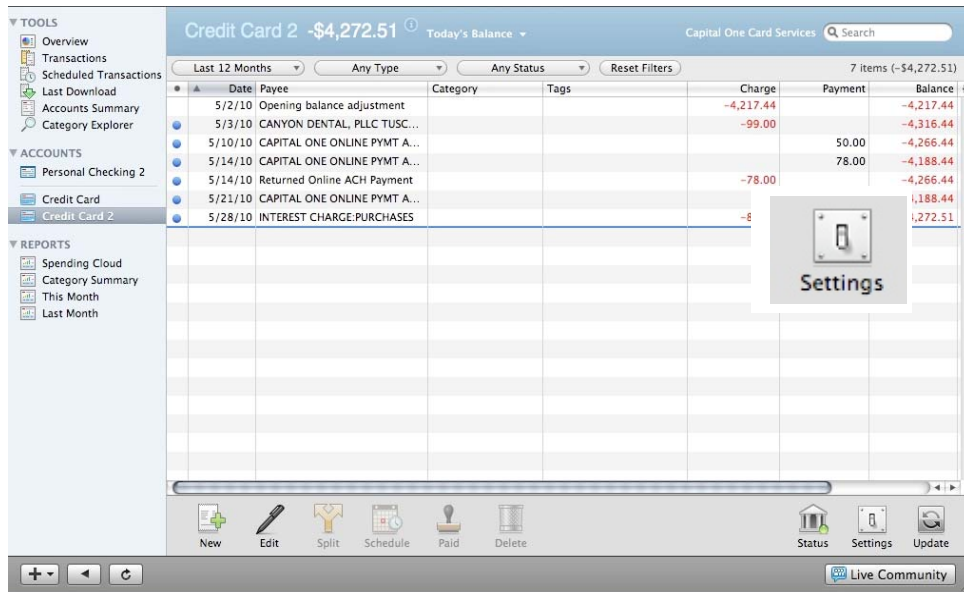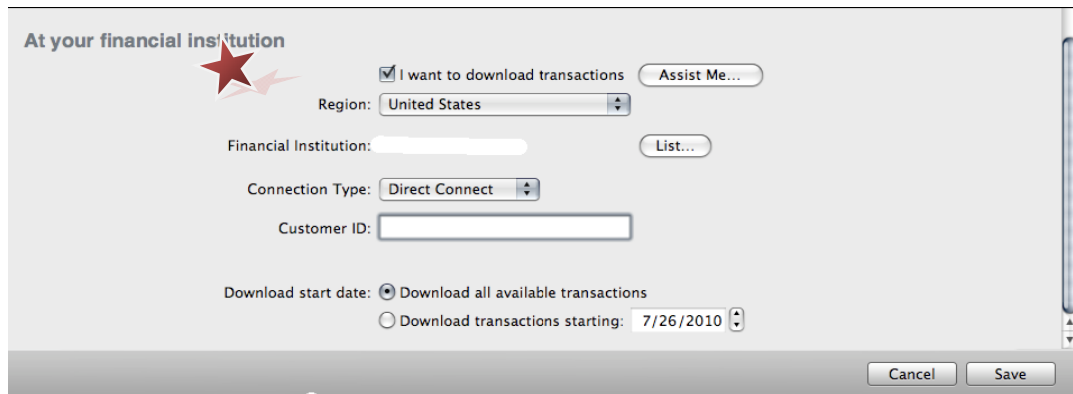
3. After you have made the changes, click Save to complete the deactivation process.

4. Repeat steps 1 through 3 for each online account (such as checking and savings).

Activate your Account for Direct Connect

1. Select your account → click Settings.

2. Check the "I want to download transactions" box.

3. Click the List button to select EECU-Fresno.

5

4. After selecting EECU-Fresno from the list, select continue to complete the online banking activation process. Ensure you have selected the download method, Direct Connect.

5. Enter your Online Access User ID (the new ID you created when you logged into the new Online Access system). Click Save.

6. Complete an update for your account by clicking on the Update icon and entering your <u>Quicken Direct Connect</u> password to download your transactions into Quicken.

7. Repeat steps 1 through 7 for each online account (such as checking and savings).

Congratulations, you completed the necessary changes!