Quicken for Windows Conversion Instructions

Web Connect

Introduction

As ***Highmark Credit Union*** completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, **you will need your User ID and Password for Highmark Credit Union**.

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

Thank you for making these important changes!

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for ***Backing Up Your Data*** and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for ***Update Software*** and follow the instructions.

Task 2: Connect to *Highmark Credit Union* for a final download no later than *10/27/2017.*

1. Download your Quicken Web Connect file from https://www.highmarkfcu.com/
2. Click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.
4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

> **NOTE:** If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

Task 3: Disconnect Accounts at *Highmark Credit Union* on or after *11/8/2017*

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate**. Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. Repeat steps for each account to be disconnected.

Task 4: Reconnect Accounts to *Highmark Federal Credit Union* on or after *11/15/2017*

1. Download your Quicken Web Connect file from http://www.highmarkfcu.com

> **NOTE:** Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

2. Click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.
3. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

IMPORTANT:	Do **NOT** select **Create a new account** unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.

4. Repeat steps for each account to be reconnected.

Quicken for Mac 2015-2017 Conversion Instructions

Web Connect

Introduction

As ***Highmark Credit Union*** completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, **you will need your User ID and Password for Highmark Credit Union**.

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

Thank you for making these important changes!

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for ***Backing Up***, select **Backing up data files**, and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for ***Updates***, select “Check for Updates,” and follow the instructions.

Task 2: Connect to *Highmark Credit Union* for a final download no later than *10/27/2017.*

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Sign in to online banking and download transactions for an account.
4. Import the transactions.
5. Repeat steps for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 2: Connect Accounts at *Highmark Credit Union* on or after *11/15/2017. Your Online Banking username and password will change. Please refer to Highmark Credit Union conversion newsletter for details.*

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select Set up transaction download.
4. Enter ***Highmark Credit Union*** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Log in to ***www.HighmarkFCU.com.*** **Download** a file of your transactions to your computer.

NOTE:	Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

6. Drag and drop the downloaded file into the box **Drop download file**.

NOTE:	Select “Web Connect” for the “Connection Type” if prompted.

7. In the “**Accounts Found**” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select “**Link”** to pick your existing account.

IMPORTANT:	Do **NOT** select “**ADD**” under the action column unless you intend to add a new account to Quicken.

8. Click **Finish**.
9. Repeat steps for each account to be connected.

Quicken for Mac 2007
Conversion Instructions

Web Connect

Introduction

As ***Highmark Credit Union*** completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your current User ID and Password.

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

Thank you for making these important changes!

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for ***Backing Up***, select "**Backing Up Your Data**," and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for ***Updates***, select "**Checking for Updates to Quicken**," and follow the instructions.

Task 2: Connect to ***Highmark Credit Union*** for a final download before ***October 27, 2017.***

1. Choose **Online** menu > **Download Transactions.**

2. Select your account from the drop-down list.

3. Click **Download** to access ***www.HighmarkFCU.com.***

4. Enter your **User ID** and **Password** to login to the website. Download your transactions through ***10-27-17*** into Quicken.

5. Repeat the download process for each account you have (such as checking, savings, credit cards and brokerage).

6. Once all accounts have been downloaded, accept all transactions into your Quicken account registers.

Task 3: Disconnect Accounts at ***Highmark Credit Union*** on or after ***11-08-17.***

1. Choose **Lists** menu > **Accounts**.

2. Select the account to deactivate and click **Edit**.

3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.

4. Remove the information within the **Account Number** and **Routing Number** fields.

5. Click **OK** to save your edits.

6. Repeat steps 2 – 5 for each account to be disconnected.

7. Verify your account list does not display a blue online circle icon for the accounts you are disconnecting.

Task 4: Connect Accounts at ***Highmark Credit Union*** on or after ***11-15-17 to the new online banking. You will be required to establish a new User ID and Password in Online Banking.***

1. Download your Quicken Web Connect file from www.HighmarkFCU.com.

> **NOTE:** Take note of the date you last had a successful connection. If you have overlapping dates in the Web Connect import, you may end up with duplicate transactions.

2. Import your transactions to Quicken.

3. Associate the account to the appropriate account already listed in Quicken. Select **Use an existing account**.

4. Match the transactions you are importing to the corresponding existing Quicken account in the drop-down list and click **OK**.

5. Repeat steps for each account to be reconnected.

6. Choose **Lists** menu > Accounts. Verify each account at has a blue online circle indicating it has been reactivated for online services.

Quicken for Windows Conversion Instructions

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To complete these instructions, **you will need your User ID and Password for Highmark Credit Union**.

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

Thank you for making these important changes!

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for ***Backing Up Your Data*** and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for ***Update Software*** and follow the instructions.

Task 2: Connect to *Highmark Credit Union* for a final download no later than *10/27/2017.*

1. Download your Quicken Web Connect file from https://www.highmarkfcu.com/
2. Click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.
4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

NOTE:	If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

Task 3: Disconnect Accounts at *Highmark Credit Union* on or after *11/8/2017*

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate**. Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. Repeat steps for each account to be disconnected.

Task 4: Reconnect Accounts to *Highmark Federal Credit Union* on or after *11/15/2017*

1. Download your Quicken Web Connect file from http://www.highmarkfcu.com

NOTE:	Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

2. Click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.
3. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

IMPORTANT:	Do **NOT** select **Create a new account** unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don’t Download into Quicken** or click the **Cancel** button.

4. Repeat steps for each account to be reconnected.