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FIRST CITIZENS'
FEDERAL CREDIT UNION

Think First.

Mint Conversion Information

Mint.com (V40)

Introduction

As *First Citizens' Federal Credit Union* completes its system conversion, Mint aggregation services may be interrupted for up to 5 business days.

> **NOTE:** You will be able to access online banking information by directly logging into your financial institution website during the interrupted time.

Mint Conversion Information

Mint.com data is stored on Intuit cloud servers. Data is updated with every change and cannot restore data to a previous point in time.

For a successful account update, do not login into Mint.com for *First Citizens' Federal Credit Union* until 5 business days after *10/17/2016.*

During this time, the Mint.com server will automatically make the system conversion for your activated accounts. If you login into Mint.com during this time, you may see duplicate accounts or an error displayed. Please do not attempt to change the status or make any changes in Mint.com during this time. After 5 business days, the accounts should reconcile showing your transaction history available.

In the event that your accounts do not display current transactions after 5 business days, you may log back into Mint.com and click refresh ⟳ to update the account. After the download completes, click the Transactions tab to view up to 90 days of transaction history.

Thank you for your patience during these changes!

QuickBooks for Mac Conversion Instructions

QuickBooks Mac

Web Connect to Direct Connect

Introduction

As ***First Citizens' Federal Credit Union*** completes its system conversion**,** you will need to modify your QuickBooks 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 the ***First Citizens' Federal Credit Union*** website.

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

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu and use the Search bar available at the top**.** Search for **Back Up** and follow the instructions on screen. The first time you do a backup, QuickBooks will guide you through setting backup preferences.

2. Download the latest QuickBooks Update. For instructions to download an update, choose **Help** menu and use the Search bar available at the top. Search for **Update QuickBooks**, select **Check for QuickBooks Updates** and follow the instructions.

Task 2: Connect to ***First Citizens' Federal Credit Union*** for a final download by *10/05/2016*

1. Log in to ***[Financial Institution A URL]*** and download your QuickBooks Web Connect File.

2. Click **File** > **Import** > **From Web Connect**.

3. Link your bank account with the existing QuickBooks account and click **Continue**.

4. Repeat steps 1 – 3 for each account with ***First Citizens' Federal Credit Union.***

Task 3: Match Downloaded Transactions

If new transactions were received from your connection, accept all new transactions into the appropriate registers.

If you need assistance matching transactions, choose the **Help** menu and use the Search bar available at the top. Search for **Updating Your Register**, select the article with that name and follow the instructions.

Task 4: Deactivate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/05/2016*

> **NOTE:** All transactions must be matched or added to the register prior to the deactivating of your account(s).

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

2. Select the account you want to deactivate.

3. Choose **Edit** menu > **Edit Account**.

4. In the **Edit Account** window, click the **Online Settings** button.

5. In the **Online Account Information** window, choose **Not Enabled** from the **Download Transaction** list and click **Save**.

6. Click **OK** for any dialog boxes that may appear with the deactivation.

7. Repeat steps 2 – 6 for each account at *First Citizens' Federal Credit Union.*

Task 5: Re-activate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/17/2016*

1. Choose **Banking** menu > **Online Banking Setup**.

2. Select *First Citizens' Federal Credit Union* from the **Financial Institution** list and click **Next**.

3. Follow the instructions in the wizard. If prompted for connectivity type, select **Direct Connect**.

4. The Online Banking Assistant window displays during setup. Select '**Yes, my account has been activated for QuickBooks online services'**, then click **Next**.

5. Enter credentials and click **Sign In**.

6. For each account you wish to download into QuickBooks, click **Select an Account** to choose the appropriate existing account register.

> **IMPORTANT:** Do **NOT** select "**New**" under the action column.

7. Click **Next**.

8. Click **Done**.

9. Add or match all downloaded transactions in the **Downloaded Transactions** window.

Thank you for making these important changes!

QuickBooks for Mac Conversion Instructions

QuickBooks for Mac

Web Connect

Introduction

As *First Citizens' Federal Credit Union* completes its system conversion, you will need to modify your QuickBooks 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 the *First Citizens' Federal Credit Union* website.

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

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose the **Help** menu and use the Search bar available at the top. Search for **Back Up** and follow the instructions on screen. The first time you do a backup, QuickBooks will guide you through setting backup preferences.

2. Download the latest QuickBooks Update. For instructions to download an update, choose **Help** menu and use the Search bar available at the top. Search for **Update QuickBooks**, select **Check for QuickBooks Updates** and follow the instructions.

Task 2: Connect to *First Citizens' Federal Credit Union* for a final download by *10/05/2016*

1. Log in to www.firstcitizens.org and download your QuickBooks Web Connect File.

2. Click **File** > **Import** > **From Web Connect**.

3. Link your bank account with the existing QuickBooks account and click **Continue**.

4. Repeat steps 1 – 3 for each account with *First Citizens' Federal Credit Union.*

Task 3: Match Downloaded Transactions

If new transactions were received from your connection, accept all new transactions into the appropriate registers.

If you need assistance matching transactions, choose the **Help** menu and use the Search bar available at the top. Search for **Updating Your Register**, select the article with that name and follow the instructions.

Task 4: Deactivate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/05/2016*

> **NOTE:** All transactions must be matched or added to the register prior to the deactivating of your account(s).

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

2. Select the account you want to deactivate.

3. Choose **Edit** menu > **Edit Account**.

4. In the **Edit Account** window, click the **Online Settings** button.

5. In the **Online Account Information** window, choose **Not Enabled** from the **Download Transaction** list and click **Save**.

6. Click **OK** for any dialog boxes that may appear with the deactivation.

7. Repeat steps 2 – 6 for each account at *First Citizens' Federal Credit Union.*

Task 5: Re-activate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/17/2016*

1. Log in to www.firstcitizens.org and download your QuickBooks Web Connect File.

> **IMPORTANT:** 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.

2. Click **File** > **Import** > **From Web Connect**.

3. If prompted for connectivity type, select **Web Connect**.

4. The **Account Association** window displays during setup. For each account you wish to download into QuickBooks, click **Select an Account** to choose the appropriate existing account register.

> **IMPORTANT:** Do NOT select "New" under the action column.

5. Click **Continue**.

6. Click **OK** to any informational prompts.

7. Add or match all downloaded transactions in the **Downloaded Transactions** window.

8. Repeat steps 1 – 7 for each account at *First Citizens' Federal Credit Union.*

Thank you for making these important changes!

QuickBooks Online Edition Conversion Instructions

QuickBooks Online Edition (QBO V78)

Introduction

As *First Citizens' Federal Credit Union* completes its system conversion, you will need to modify your QuickBooks Online Edition 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 the *First Citizens' Federal Credit Union* website.

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

Documentation and Procedures

Conversion – Information only

QuickBooks Online data is stored on Intuit servers in the cloud. Since we update your records with every change, we cannot restore your file to a previous point in time.

QuickBooks Online automatically updates your selected version so you are always on the latest release.

> **IMPORTANT:** QuickBooks Online edition connectivity services may be interrupted up to 3-5 business days after the conversion is complete.

Task 1: Deactivate Your Account(s) At *First Citizens' Federal Credit Union* on or after *10/05/2016*

1. Choose **Transactions** > **Banking**.

2. Click on the account you'd like to disconnect, then click the **Pencil Icon**.

3. Click on **Edit Account Info**.

4. Check the box next to **Disconnect this account on save**.

5. Click **Save**.

6. Repeat steps 2—6 for each account at *First Citizens' Federal Credit Union*.

Task 2: Re-activate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/17/2016*

1. Choose **Transactions** > **Banking**.

2. In the upper right corner, click **Add Account**

3. Enter *First Citizens' Federal Credit Union*, and click **Find**.

4. Click the link for *First Citizens' Federal Credit Union*.

5. Type your **User ID** and **Password**. Click **Log In**.

6. Ensure you associate the account for *First Citizens' Federal Credit Union* to the appropriate account already listed under **QuickBooks Accounts**. You will want to select the matching accounts in the drop-down menu.

> **IMPORTANT:** Do **NOT** select **+Add new**. If you are presented with accounts you do not want to track in this data file, **Uncheck** the box next to the **Account name**.

7. After all accounts have been matched, click **Connect**.

8. When the download is finished click **I'm done. Let's go!**

Task 3: Excluding Duplicate Transactions

1. Choose **Transactions** > **Banking**.

2. In the **New Transactions** section, click the checkboxes for the transactions you want to exclude.

3. Click **Batch Actions** > **Exclude Selected**.

> **NOTE:** If you accidentally exclude a transaction, you can include it again.

Task 4: Undo Excluded Transactions

1. Choose **Transactions** > **Banking**.

2. Click the **Excluded** tab.

3. Click the checkboxes for the transactions you want to include.

4. Click **Batch Actions** > **Undo**.

5. Transactions will appear again in the **New Transactions** tab for you to work with.

Additional Instructions: Manually Import Transactions

1. Log in to *First Citizens' Federal Credit Union* website at www.firstcitizens.org

2. Download one of the following Web Connect files.

   a. .qbo (QuickBooks)

   b. .qfx (Quicken)

3. In **QuickBooks Online**, choose **Transactions** > **Banking**.

4. In the upper right corner, click **File Upload**.

5. Click Browse and select *First Citizens' Federal Credit Union* Web Connect file from your computer.

6. Click **Next**.

7. In the drop-down menu, select the account where you'd like to upload the transactions.

8. When the download is finished click **I'm done. Let's go!**

9. After your download finishes, click the **New Transactions** tab to see what was downloaded.

Thank you for making these important changes!

Quicken for Mac Conversion Instructions

Quicken for Mac 2015-2016

Web Connect

Introduction

As *First Citizens' Federal 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 the websites.

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

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 *First Citizens' Federal Credit Union* for a final download by *[10/5/2016]*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Update Selected Online Account**.

3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Deactivate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/5/2016*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Settings**.

3. Select **Troubleshooting** > **Deactivate Downloads.**

4. Repeat steps for each account at *First Citizens' Federal Credit Union.*

Task 4: Reactivate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/17/2016*

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 *First Citizens' Federal Credit Union* in the **Search** field, select the name in the **Results** list and click **Continue**.

5. Log in to www.firstcitizens.org . **Download** a file of your transactions to your computer.

6. 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.

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

> **NOTE:**   Select "Web Connect" for the "Connection Type" if prompted.

8. 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.

9. Click **Finish**.

10. Repeat steps for each account you are reactivating in Quicken.

Thank you for making these important changes!

QuickBooks for Windows Conversion Instructions

QuickBooks Windows

Web Connect

Introduction

As *First Citizens' Federal Credit Union* completes its system conversion, you will need to modify your QuickBooks 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 the *First Citizens' Federal Credit Union* website.

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

Documentation and Procedures

Task 1: Conversion Preparation

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

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

> **NOTE:** If multiple computers do not use the same QuickBooks data file, skip step 3. QuickBooks activities such as **Online Banking** cannot be performed in multi-user mode because of the way the activities interact with a company data file.

3. Switch to single user mode. For instructions to switch to single user mode, choose **Help** menu > **QuickBooks Help**. Search for **Switch to Single User Mode** and follow the instructions.

> **NOTE:** If you are not using Classic Mode (Register Mode), enable it for the conversion. You can change it back after the conversion is complete.

4. Enable Classic Mode (Register Mode).

5. For instructions to enable Classic Mode (Register Mode), choose **Help menu > QuickBooks Help**. Search for **Banking Feed Modes**, select **Bank Feeds Modes overview**, scroll down, and follow the instructions.

Task 2: Connect to *First Citizens' Federal Credit Union* for a final download by *10/05/2016*

1. Log in to *First Citizens' Federal Credit Union* and download your QuickBooks Web Connect file.

2. Click **File** > **Utilities** > **Import** > **Web Connect Files**.

3. Link your bank account with the existing QuickBooks account and click **Continue**.

4. Repeat steps 1 - 3 for each account with *First Citizens' Federal Credit Union.*

Task 3: Match Downloaded Transactions

If new transactions were received from your connection, accept all new transactions into the appropriate registers.

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

Task 4: Deactivate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/05/2016*

> **NOTE:** All transactions must be matched or added to the register prior to deactivating your account(s).

1. Choose the **Lists menu** > **Chart of Accounts**.

2. Select the account you want to deactivate.

3. Click **Edit menu** > **Edit Account**.

4. Click on the **Bank Feed Settings** tab in the Edit Account window.

5. Select **Deactivate All Online Services** and click **Save & Close**.

6. Click **OK** for any dialog boxes that may appear with the deactivation.

7. Repeat steps 2 – 6 for each account at *First Citizens' Federal Credit Union.*

Task 5: Re-activate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/17/2016*

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1. Log in to www.firstcitizens.org and download your QuickBooks Web Connect file.

2. Click **File** > **Utilities** > **Import** > **Web Connect Files**.

> **IMPORTANT:** 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.

3. If prompted for connectivity type, select **Web Connect**.

4. Click the **Import new transactions now** radio button, then click **OK**.

> **NOTE:** If you previously removed the check from the "Always give me the option of saving to a file..." option, then this dialog will not display.

5. In the **Select Bank Account** dialog, click **Use an existing QuickBooks** account.

6. In the corresponding drop-down list, select your QuickBooks account, and click **Continue**.

7. Confirm the prompt by clicking **OK**.

8. Repeat steps 1 - 7 for each account that you previously disabled.

> **IMPORTANT:** Verify that all transactions downloaded successfully into your account registers.

Task 6: Re-enable Express Mode (if necessary)

> **NOTE:** If you prefer Classic Mode (Register Mode), you are finished with your conversion. If you use Express Mode for online banking, you may now re-enable the mode.

For instructions to enable Express Mode, choose **Help** > **QuickBooks Help**. Search for **Banking Feed Modes**, then select **Bank Feed Modes overview**, and follow the instructions.

Thank you for making these important changes!

Quicken for Mac Conversion Instructions

Quicken for Mac 2015/2016

Express Web Connect to Direct Connect

Introduction

As *First Citizens' Federal 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 the *First Citizens' Federal Credit Union* website.

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

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 *First Citizens' Federal Credit Union* for a final download by *10/05/2016*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Update Selected Online Account**.

3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Deactivate Your Account(s) At *First Citizens' Federal Credit Union* on or after *10/05/2016*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Settings**.

3. Select **Troubleshooting** > **Deactivate Downloads.**

4. Repeat steps for each account at *First Citizens' Federal Credit Union.*

Task 4: Re-activate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/17/2016*

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 *First Citizens' Federal Credit Union* in the **Search** field, select the institution name in the **Results** list and click **Continue**.

5. Enter your Direct Connect **User Id** and **Password** and click **Continue**.

6. If the bank requires extra information, enter it to continue.

> **NOTE:** Select "Direct Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, 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. Select **Finish**.

Thank you for making these important changes!

Quicken for Mac Conversion Instructions

Quicken for Mac 2015-2016

Express Web Connect

Introduction

As *First Citizens' Federal 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 the *First Citizens' Federal Credit Union* website.

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

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 *First Citizens' Federal Credit Union* for a final download by *10/05/2016*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Update Selected Online Account**.

3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) you use for online banking or investing.

Task 3: Deactivate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/05/2016*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Settings**.

3. Select **Troubleshooting** > **Deactivate Downloads.**

4. Repeat steps for each account at *First Citizens' Federal Credit Union.*

Task 4: Reactivate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/17/2016*

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 *First Citizens' Federal Credit Union* in the **Search** field, select the name in the **Results** list and click **Continue**.

5. Enter your **User Id** and **Password** and click **Continue**.

6. If the bank requires extra information, enter it to continue.

> **NOTE:** Select "Express Web Connect" or "Quicken 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.

8. Select **Finish**.

Thank you for making these important changes!

Quicken for Mac Conversion Instructions

Quicken for Mac 2015-2016

Web Connect

Introduction

As ***First Citizens' Federal 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 the ***First Citizens' Federal Credit Union*** website.

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

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 ***First Citizens' Federal Credit Union*** for a final download by *10/05/2016*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Update Selected Online Account**.

3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Deactivate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/05/2016*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Settings**.

3. Select **Troubleshooting** > **Deactivate Downloads.**

4. Repeat steps for each account at *First Citizens' Federal Credit Union.*

Task 4: Reactivate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/17/2016*

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 *First Citizens' Federal Credit Union* in the **Search** field, select the name in the **Results** list and click **Continue**.

5. Log in to www.firstcitizens.org . **Download** a file of your transactions to your computer.

6. 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.

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

> **NOTE:**   Select "Web Connect" for the "Connection Type" if prompted.

8. 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.

9. Click **Finish**.

10. Repeat steps for each account you are reactivating in Quicken.

Thank you for making these important changes!

Quicken for Mac
Conversion Instructions

Quicken for Mac 2007

Web Connect to Direct Connect

Introduction

As *First Citizens' Federal 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 the *First Citizens' Federal Credit Union* website.

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

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 *Check for Updates*, and follow the instructions.

Task 2: Connect to *First Citizens' Federal Credit Union* for a final download by *10/05/2016*

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

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

3. Click **Download** to access www.firstcitizens.org

4. Enter your **User ID** and **Password** to login to the website. Download your transactions through *[Enter Date]* 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: Deactivate Your Account(s) At *First Citizens' Federal Credit Union* on or after *10/05/2016*

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 at *First Citizens' Federal Credit Union*.

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

Task 4: Re-activate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/17/2016*

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

2. Select your first disabled account and click **Edit**.

3. Click the **Financial Institution** drop-down list and select **Change Financial Institution**.

4. Click on **Update List**.

5. In the **Financial Institutions** dialog, select *First Citizens' Federal Credit Union* from the list and click **Use**.

6. Enter your Direct Connect **User ID** and **Password**. Click **OK**.

7. In the **Add Online Services** dialog, match your first account to the appropriate account number. Click **OK**.

> **NOTE:** Each account will be displayed below "**Use an existing account**."

8. Click **OK**.

9. Click OK to close the **Edit Register** page.

10. Choose **Lists** menu > **Accounts**. Verify that each account you are reactivating has a blue online circle for online services.

Thank you for making these important changes!

Quicken for Mac
Conversion Instructions

Quicken for Mac 2007

Web Connect

Introduction

As *First Citizens' Federal 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 the *First Citizens' Federal Credit Union* website.

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

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 *First Citizens' Federal Credit Union* for a final download by *10/05/2016*

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

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

3. Click **Download** to access www.firstcitizens.org .

4. Enter your **User ID** and **Password** to login to the website. Download your transactions through *[Enter Date]* 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: Deactivate Your Accounts at *First Citizens' Federal Credit Union* on or after *10/05/2016*

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 at *First Citizens' Federal Credit Union*.

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

Task 4: Reactivate Your Accounts at *First Citizens' Federal Credit Union* on or after *10/17/2016*

1. Download your Quicken Web Connect file from www.firstcitizens.org .

    > **IMPORTANT:** 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 you are reactivating.

6. Choose **Lists** menu > Accounts. Verify each account at *First Citizens' Federal Credit Union* has a blue online circle indicating it has been reactivated for online services.

Thank you for making these important changes!

Quicken for Mac
Conversion Instructions

Quicken for Mac 2015

Web Connect to Direct Connect

Introduction

As *First Citizens' Federal 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 the *First Citizens' Federal Credit Union* website.

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

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 *First Citizens' Federal Credit Union* for a final download by *10/05/2016*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Update Selected Online Account**.

3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Deactivate Your Account(s) At *First Citizens' Federal Credit Union* on or after *10/05/2016*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Settings**.

3. Select Troubleshooting > Deactivate Downloads.

4. Repeat steps for each account at *First Citizens' Federal Credit Union.*

Task 4: Re-activate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/17/2016*

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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 *First Citizens' Federal Credit Union* in the **Search** field, select the institution name in the **Results** list and click **Continue**.

5. Enter your Direct Connect **User Id** and **Password** and click **Continue**.

6. If the bank requires extra information, enter it to continue.

NOTE: Select "Direct Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, 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. Select **Finish**.

Thank you for making these important changes!

Quicken for Windows Conversion Instructions

Quicken for Windows 2013-2016

Express Web Connect to Direct Connect

Introduction

As *First Citizens' Federal 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 the *First Citizens' Federal Credit Union* website.

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

Documentation and Procedures

Task 1: Conversion Preparation

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

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

Task 2: Connect to *First Citizens' Federal Credit Union* for a final download by *10/05/2016*

1. Choose **Tools** menu > **One Step Update**.

2. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.

3. In the **One Step Update Settings** dialog, make sure all items are checked and click **Update Now**.

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: Deactivate Your Account(s) At *First Citizens' Federal Credit Union* on or after *10/05/2016*

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 2—6 for each account to be deactivated.

Task 4: Re-activate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/17/2016*

1. Choose **Tools** menu > **Account List**.

2. Click the **Edit** button of the account you want to activate.

3. In the Account Details dialog, click on the **Online Services tab**.

4. Click **Set up Now**.

5. Use **Advanced Setup** to activate your account.

6. Enter *First Citizens' Federal Credit Union* and click **Next**.

7. If presented with the Select Connection Method screen, select **Direct Connect**.

8. Type your Direct Connect **User ID** and **Password** and click **Connect**.

9. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching accounts in the drop-down menu.

> **IMPORTANT:** Do **NOT** select **Add to Quicken** unless you want 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**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.

11. Click **Done** or **Finish**.

Thank you for making these important changes!

Quicken for Windows Conversion Instructions

Quicken for Windows 2013-2016

Express Web Connect

Introduction

As **First Citizens' Federal 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 the **First Citizens' Federal Credit Union** website.

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

Documentation and Procedures

Task 1: Conversion Preparation

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

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

Task 2: Connect to **First Citizens' Federal Credit Union** for a final download by **10/05/2016**

1. Choose **Tools** menu > **One Step Update**.

2. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.

3. In the **One Step Update Settings** dialog, make sure all items are checked and click **Update Now**.

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: Deactivate Your Accounts at **First Citizens' Federal Credit Union** on or after **10/05/2016**

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 2—6 for each account to be deactivated.

Task 4: Re-activate Your Accounts at *First Citizens' Federal Credit Union* on or after *10/17/2016*

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1. Choose **Tools** menu > **Account List**.

2. Click the **Edit** button of the account you want to activate.

3. In the Account Details dialog, click on the **Online Services tab**.

4. Click **Set up Now**.

5. Use **Advanced Setup** to activate your account.

6. Enter *First Citizens' Federal Credit Union* and click **Next**.

7. If presented with the Select Connection Method screen, select **Express Web Connect**.

8. Enter your **User ID** and **Password**. Click **Connect**.

> **NOTE:**   You may be presented with a security question from your Financial Institutions prior to receiving your accounts.

9. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching accounts in the drop-down menu.

> **IMPORTANT:**   Do **NOT** select **Add to Quicken** 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**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.

11. Click **Done** or **Finish**.

Thank you for making these important changes!

Quicken for Windows Conversion Instructions

Quicken for Windows 2013–2016

Web Connect to Direct Connect

Introduction

As ***First Citizens' Federal 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 the ***First Citizens' Federal Credit Union*** website.

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

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 ***First Citizens' Federal Credit Union*** for a final download by ***10/05/2016***

1. Download your Quicken Web Connect file from www.firstcitizens.org

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: Deactivate Your Account(s) At ***First Citizens' Federal Credit Union*** on or after ***10/05/2016***

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 you wish to deactivate.

Task 4: Re-activate Your Account(s) at *First Citizens' Federal Credit Union* on or after *10/17/2016f*

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1. Choose **Tools** menu > **Account List**.

2. Click the **Edit** button of the account you want to activate.

3. In the Account Details dialog, click on the **Online Services tab**.

4. Click **Set up Now**.

5. Use **Advanced Setup** to activate your account.

6. Enter *First Citizens' Federal Credit Union* and click **Next**.

7. If presented with the Select Connection Method screen, select **Direct Connect**.

8. Type your Direct Connect **User ID** and **Password** and click **Connect**.

9. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching accounts in the drop-down menu.

> **IMPORTANT:** Do **NOT** select **Add to Quicken** unless you want 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**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.

11. Click **Done** or **Finish**.

Thank you for making these important changes!

Quicken for Windows Conversion Instructions

Quicken for Windows 2013–2016

Web Connect

Introduction

As *First Citizens' Federal 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 the *First Citizens' Federal Credit Union* website.

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

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 *First Citizens' Federal Credit Union* for a final download by *10/05/2016*

1. Download your Quicken Web Connect file from www.firstcitizens.org .

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: Deactivate Accounts at *First Citizens' Federal Credit Union* on or after *10/05/2016*

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 you wish to deactivate.

Task 4: Reactivate Accounts at *First Citizens' Federal Credit Union* on or after *10/17/2016*

1. Download your Quicken Web Connect file from www.firstcitizens.org .

> **IMPORTANT:** 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 you wish to reactivate in Quicken.

Thank you for making these important changes!