

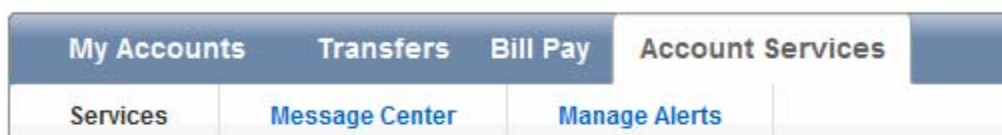
IMPORTANT INSTRUCTIONS FOR QUICKEN USERS

Quicken for Windows v.2009-2011

STEP 1:

Verify enrollment in Quicken services on PHFCUOnline

Login to PHFCUOnline and click Account Services. Under **Account Tools and Services**, click **Quicken**. (If you do not see Quicken, it means you are already enrolled. Proceed to Step 2.)



Account Services



STEP 2:

Backup Your Current Data in Quicken

1. Open up Quicken and choose **File** -> **Backup**
2. Specify the file and location of backup and click **OK**

STEP 3:

Download the Latest Quicken Software Update

1. Click the **Update** icon on the Quicken toolbar.
2. In the One Step Update Setting screen, uncheck all the boxes then click **Update Now**.
3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving this update.
4. When the update is complete, close Quicken.
5. Re-open Quicken

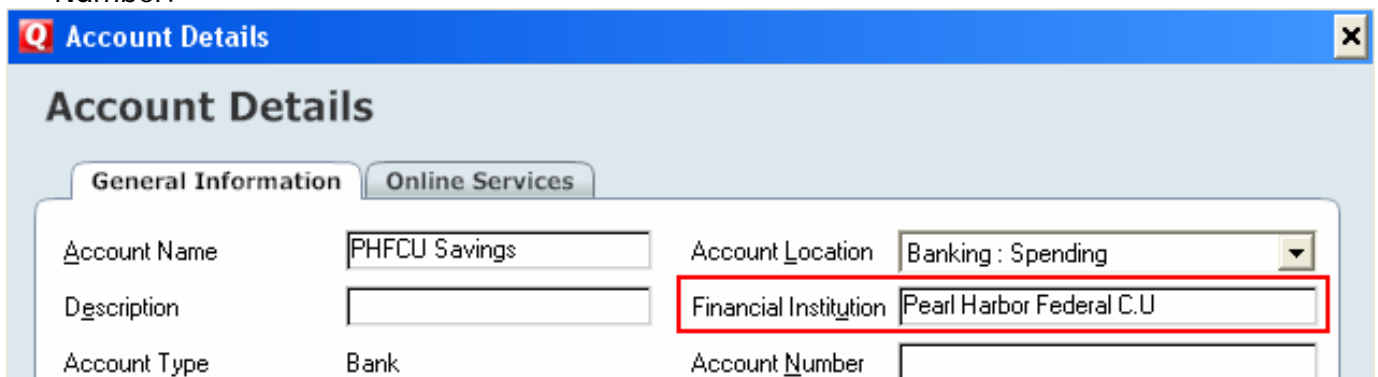
STEP 4: Get your latest transactions in Quicken

The Financial Institution name registered for Quicken has changed from "Pearl Harbor Federal Credit Union" to "Pearl Harbor Federal C.U" The following steps explain how to add the new name then link it to your existing PHFCU Quicken account(s).

1. Click **Tools** -> **Account List**. Highlight your PHFCU account and click **Edit Details** button.
2. If the Financial Institution name is grayed out, you first need to temporarily remove your account from One step Update. Click the **Online Services** tab and click **Remove from One Step Update** or **Remove Connection**.

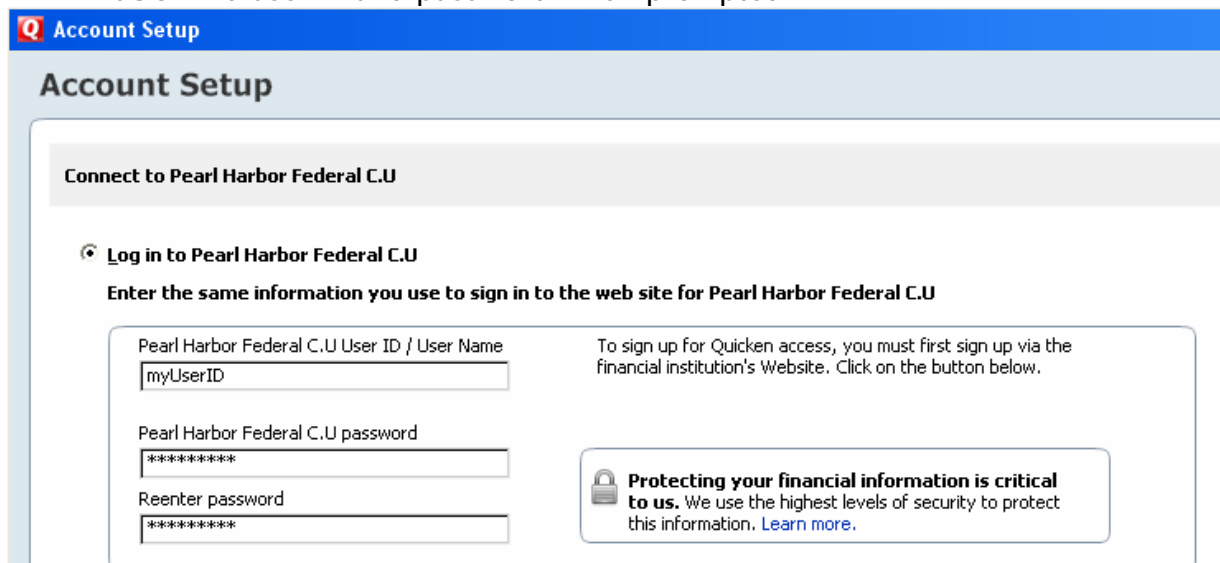
Repeat this step for each PHFCU account in Quicken.

3. Return to the **General Information** tab of any PHFCU account and change the Financial Institution name from "Pearl Harbor Federal Credit Union" to "**Pearl Harbor Federal C.U**" (please note: there is a period after the "C" but not after the U) Also, delete your Account Number.



The screenshot shows the 'Account Details' window with the 'General Information' tab selected. The 'Financial Institution' field is highlighted with a red box and contains the text 'Pearl Harbor Federal C.U'. Other fields include 'Account Name' (PHFCU Savings), 'Account Location' (Banking : Spending), 'Description', 'Account Type' (Bank), and 'Account Number'.

4. Return to the **Online Services** tab and **Activate One Step Update**. Enter your PHFCUOnline userID and password when prompted.



The screenshot shows the 'Account Setup' window with the 'Log in to Pearl Harbor Federal C.U' section. It contains three input fields: 'Pearl Harbor Federal C.U User ID / User Name' (containing 'myUserID'), 'Pearl Harbor Federal C.U password' (containing '*****'), and 'Reenter password' (containing '*****'). A security warning box on the right states: 'Protecting your financial information is critical to us. We use the highest levels of security to protect this information. [Learn more.](#)'

5. Quicken will discover your accounts. Click the Next button.
6. On the following screen you will be able to link to your existing PHFCU account(s) in Quicken. Select the **Exists in Quicken** or **Link** option and select your account from the drop down. Click **Next** to begin transaction download.

Account Setup

Add Your Accounts

We found the following accounts for you at Pearl Harbor Federal C.U
The checked accounts will be added to Quicken.
We also recommend entering an account nickname, which will be displayed in Quicken.

Select	Account	Type	Account nickname
<input checked="" type="checkbox"/>	1234-001 SAVINGS	Savings	PHFCU - Savings
<input checked="" type="checkbox"/>	1234-002 SHARE DRAFT ACCOUN 002	Checking	PHFCU - Check

Radio button options for each account:

- New In Quicken
- Exists In Quicken
- New In Quicken
- Exists In Quicken

7. Please verify transactions and delete any duplicates.

If you are still experiencing problems downloading your transactions, please contact us via Online Banking messaging or by phone 73-PHFCU. You can also obtain online and telephone assistance directly from Quicken at quicken.com/support.