

Instructions for Microsoft Money

Step 1:

Perform a back up of your Money data.

Step 2:

Connect to First Tech to download your account data. Once your connection is complete you will notice that an additional credit card account was downloaded (for each credit card account you have a new one that will download). You will also notice a message indicating that the update was unsuccessful. If you review your summary update you will find messages indicating the following:

Microsoft Money could not update your account because your bank or brokerage does not have a record of it. The account may be closed or the account number may have changed. [Learn more.](#)

Step 3:

- Choose the “Merge Accounts” option from the left-hand navigation.
- Match your new credit card account number with the old account number.

If you have duplicate credit card accounts continue to Step 4.

Merge your duplicate accounts

Your Money file may contain two versions of some accounts: one version that was downloaded when you set up online services and one that contains the transactions you add manually. On this page, you can merge these duplicate accounts.

First Tech - Test	
First Tech - Test Visa Platinum XXXXXXXXXXXX	Merge: First Tech - Test Visa Platinum #4 ▼
First Tech - Test Visa Platinum #2 XXXXXXXXXXXX	Merge: First Tech - Test Visa Platinum #5 ▼

Your account match up will complete and you will be able to continue with your account data download.

Step 4:

If you have duplicate credit card accounts you will only be able to match one of them to the new account number. The duplicate account can be closed.

- Go to the “Account List.”
- Right click on the duplicate credit card account. A menu will appear.
- Click on “See Account Settings.”
- Place a check mark in the box next to “This account has been closed.”
- Click on “Done.”