

Instructions for Quicken

Step 1:

Perform a backup of your Quicken data.

Step 2:

- In Quicken, go to your credit card account register and choose the “Overview” tab. You should see that your account number is listed as your credit card number.
- Click on “Edit Account Details.”
- Change the account number to your new account number.
- Click “OK.”

Perform these steps for each credit card that you have with First Tech.
If you have a duplicate credit card accounts go to Step 4.

Quicken MAC users:

- Go to “Lists” > “Accounts.”
- Highlight account to change and click “Edit.”
- Enter new number.
- Click “OK.”

Perform these steps for each credit card that you have with First Tech.
If you have a duplicate credit card account you can delete it or close it.

Step 3:

You can now proceed to update your accounts.

Step 4:

If you have a duplicate credit card account, you can delete it:

- Go to your duplicate credit card account and choose the “Overview” tab.
- Click on “Edit Account Details.”
- Click on “Delete Account.”
- Confirm the deletion of the account.

You may now proceed to update your accounts.

NOTE:

If you do not perform the changing of your account number for your credit card prior to downloading your account information, you may receive an error message similar to the following:

▼ **First Tech Credit Union** 11/22/2006 2:18 pm

Quicken was not able to update your accounts. This is likely caused by a temporary server outage. Update your accounts the next business day. If the error continues, additional information to resolve this error is available.[OL-393-A]

Your financial institution has rejected your request. Additional information from First Tech Credit Union: The server does not support the BANKM5GSRQV1 request, or a request was made against an invalid organization. Please verify the Organization name and FID and try again. [ref: 77AC6CF2-79AA-1000-A035-C97271010026][OL-301-A]

Your financial institution has rejected your request. Additional information from First Tech Credit Union: The server does not support the BANKM5GSRQV1 request, or a request was made against an invalid organization. Please verify the Organization name and FID and try again. [ref: 77AC6CF3-79AA-1000-A035-C97271010026][OL-301-A]

If you receive these errors you can follow the steps above then try your connection again.