In order to use Quicken, you will need KFCU Online access. To apply for KFCU Online Banking, please call our Telephone Service Center at 505.254.4369 or 800.880.5328 or visit one of our four convenient branch locations.

Our vendor is unable to get mortgage history to download.

If you are not sure what download method you are using in Quicken, you can find out by going to the Quicken menu and choosing Tools > Account List. Click on the Edit button next to one of your KFCU accounts and click on the Online Services tab which shows your Connection Method.

If you are having issues downloading your history, you may need to deactivate and reactivate your connection with KFCU. Make sure that you have a good backup before you deactivate your accounts.

It is important that you perform the following instructions exactly as described and in the order presented.

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 to download an update, choose **Help** menu → **Quicken Help**. Search for "Update Software" and follow the instructions.

Deactivate Your Account(s) At Kirtland Federal Credit Union

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 on **Deactivate**. Follow the prompts to confirm the deactivation.

5. Click on the **General** tab. Delete the Account Number.

6. Delete the name of the Financial Institution. Click **OK** to close the window.

7. Repeat steps 2 – 6 for each account at Kirtland Federal Credit Union.

8. On the Account List screen, Transaction Download should read *Not Available* for each of your KFCU accounts.

Re-activate Your Account(s) at Kirtland Federal Credit Union

1. In **Account List** click the **Edit** button of one of the accounts you want to activate.

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

3. Click **Set Up Now…**

4. Enter **Kirtland Federal Credit Union** and click **Next**.

5. Type your KFCU Online Username and Password. Click **Connect.**

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

   DO NOT select **Add – add 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**.

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

8. You will receive confirmation that your account(s) have been added → Click **Finish**.

Please carefully review your downloaded transactions afterwards to ensure no transactions were duplicated or missed on the register. Check Quicken Help for assistance on deleting/voiding duplicate transactions. If you have any questions, please contact our Telephone Service Center at 505.254.4369 or 800.880.5328.