

Getting Started with TIC Federal Credit Union's eBranch and Quicken 2004-2006

Register for TIC Federal Credit Union's eBranch Service

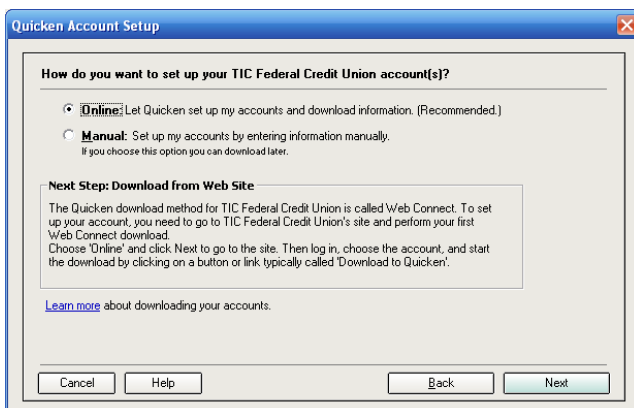
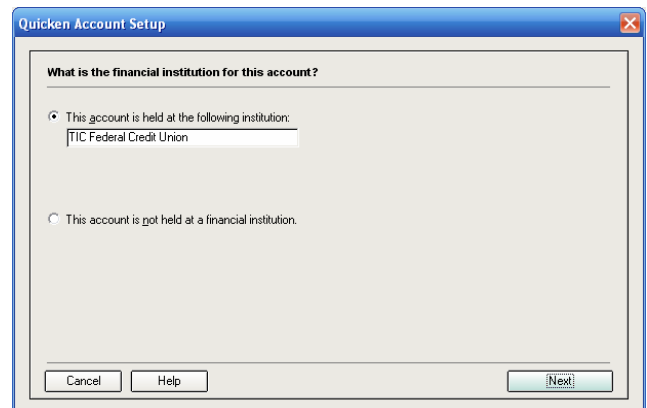
Prior to setting up your accounts in Quicken, you must first register for TIC Federal Credit Union's eBranch service. If you are not registered for eBranch, go to www.ticfcu.com and click the eBranch/Bill Pay link, and enter your member # and your MTS access code given to you at the time of your account opening. If you do not have for MTS access code, please contact a TIC representative at 706.320.8500 or stop by one of our locations.

New Quicken 2004-2006 User

Use the New Account setup procedures below if you do not currently have your TIC accounts setup/established in Quicken.

1. Open Quicken. If you are new to Quicken follow the steps to setup Quicken for the first time. The initial questions are for your personal Quicken options and settings.

2. You will be presented with the Add Account screen. **Select** the appropriate account you wish to add (i.e. checking, savings, etc.). The first question asked is "What is the financial institution for this account?" **Select** the first option "This account is held at the following institution" and type "TIC Federal Credit Union" in the box as show below, and click **Next**.



3. The next question is "How do you want to set up your TIC Federal Credit Union account(s)?" **Select** "Online" and click **Next**. Your browser will open and Quicken will ask "Do you have your Quicken Customer ID and PIN?" **Select** the option: "Yes, I have my ID and PIN" and click "OK".

4. After clicking **Ok** your browser should have opened and you should now see TIC Federal Credit Union's eBranch login page. If your browser did not open and you do not see the eBranch login page. Please open your browser and go to www.ticfcu.com and click the eBranch/Bill Pay link.
5. Log into eBranch with your member number and current password.

6. In eBranch, click the “Account Access” link and then select **Export**. Choose the account you are setting up from the “SOURCE” account drop-down (i.e. Savings, Checking, etc.). Select a “Start Date” of 01/01/2004 and an “End Date” of today’s date, to ensure that you retrieve all of your history currently available for download. Select an export format of: “Quicken Financial Exchange (QFX)”. Click **Download Data**.

Warning: if you do not download your entire history and later on you download history prior to the date you specified in step 6, your Quicken account register will display incorrectly and you will have to delete the account and start over.

7. After clicking the “Download Data” button, you may be asked to Open or Save. Click **Open**. The file will then be processed into Quicken. A box will display in Quicken stating that you are downloading transactions and display your account information. Enter the name of the account that you wish to display in Quicken and select “Continue”.

8. Quicken will then process all of the account transactions into your register for the account being set up.

Your account has now been setup in Quicken. In the future, you can download your new transactions in one of two ways:

1. Log into eBranch and follow the procedures from step 6 above, or
2. Open Quicken and click the account you wish to download transactions for to view the register. At the top of the register click the “Update Now” button. Quicken’s browser will open up to the eBranch login page. Follow the procedures in Step 6 above to download your new transactions.

Current Quicken 2004-2006 User

If you are currently using Quicken to manage your TIC Federal Credit Union accounts follow the steps below:

1. Log into eBranch with your member number and current password.

2. In eBranch, click the "Account Access" link and then select **Export**. Choose the account you are setting up from the "SOURCE" account drop-down (i.e. Savings, Checking, etc.). Select a "Start Date" of 01/01/2004 and an "End Date" of today's date, to ensure that you retrieve all of your history currently available for download. Select an export format of: "Quicken Financial Exchange (QFX)". Click **Download Data**.

Warning: if you do not download your entire history and later on you download history prior to the date you specified in step 6, your Quicken account register will display incorrectly and you will have to delete the account and start over.

3. After clicking the Download Data button, you may be asked to Open or Save. Click **Open**. The file will then be processed into Quicken. A box will display in Quicken stating that you are downloading transactions for the following account and display your account information. Select the option "Use an existing Quicken account" and select the appropriate account from the drop-down menu and click continue.

4. Quicken will then process all of the account transactions into your register for the account being set up. You may have to 'match' some transaction if Quicken is unable to determine if the transaction is identical to a transaction currently in your register.

Your account has now been setup in Quicken. In the future, you can download your new transactions in one of two ways:

1. Log into eBranch and follow the procedures from step 2 above, or
2. Open Quicken and click the account you wish to download transactions for to view the register. At the top of the register click the Update Now button. Quicken's browser will open up to the eBranch login page. Follow the procedures in Step 2 above to download your new transactions.

NEED MORE INFORMATION ?

Visit the Quicken Web site at <http://www.quicken.com>