

# Quicken for Mac 2015-2017 Conversion Instructions



## Express Web Connect

### Introduction

As UT Federal Credit Union (UTFCU) completes its online banking system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your Login ID and Password for UTFCU online banking.

**NOTE:** Quicken Express Web Connect uses the same User ID and Password as UT Federal Credit Union's website.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

### Documentation and Procedures

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#### Task 1: Conversion Preparation

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1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up**, select **Backing up data files**, and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates**, select "Check for Updates," and follow the instructions.

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#### Task 2: Disconnect Accounts from UTFCU on or after **12/12/2017**

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1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Troubleshooting** > **Deactivate Downloads**.
4. Repeat steps for each account to be disconnected.

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**Task 3:** Reconnect Accounts from UTFCU on or after **12/20/2017**

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1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download**.
4. Enter UTFCU in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Enter your **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

**NOTE:** Select "Express Web Connect" or "Quicken Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select "**Link**" to pick your existing account.

**IMPORTANT:** Do **NOT** select "**ADD**" under the action column.

8. Select **Finish**.

***Thank you for making these important changes!***