



# Quicken for Mac 2015-2017 Conversion Instructions

---

*Express Web Connect*

## Introduction

To complete these instructions, you will need your **UFCU Online Banking Login ID and Password**.

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.

*Thank you for making these important changes!*

## Documentation and Procedures

---

### Task 1: Conversion Preparation

---

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.

---

### Task 2: Disconnect Accounts at **University FCU (TX)**

---

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.

---

**Task 3: Reconnect Accounts to *University Federal CU - New***

---

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 ***University Federal CU – NEW*** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Enter your **Login 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**.