

# Quicken for Windows Conversion Guide

Quicken for Windows 2011-2013  
Direct Connect/Express Web Connect to Express Web Connect

## Table of Contents

Introduction.....	2
Documentation and Procedures .....	2
<b>Task 1: Conversion Preparation .....</b>	<b>2</b>
<b>Task 2: Connect to United Heritage Credit Union (optional) .....</b>	<b>2</b>
<b>Task 3: Deactivate Your Account(s) At United Heritage Credit Union.....</b>	<b>3</b>

## Introduction

To use Quicken with the new UHCU Online Banking system, you need to modify your Quicken settings and transition your data. You will need your UHCU Online Banking **Username** and **Password** to complete this process.

It is important that you follow the guide exactly as outlined below. If you do not follow the guide, your service may stop functioning properly. This conversion should take 15–30 minutes.

## Documentation and Procedures

---

### Task 1: Conversion Preparation

---

1. Back up your data file.

Please note: For instructions to back up your data file, select **Help** menu > **Search**. Search for “Back Up Data File” and follow the instructions.

2. Download the latest Quicken update.

Please note: For instructions to download an update, select **Help** menu > **Quicken Help**. Search for “Update Software” and follow the instructions.

---

### Task 2: Connect to United Heritage Credit Union (optional)

---

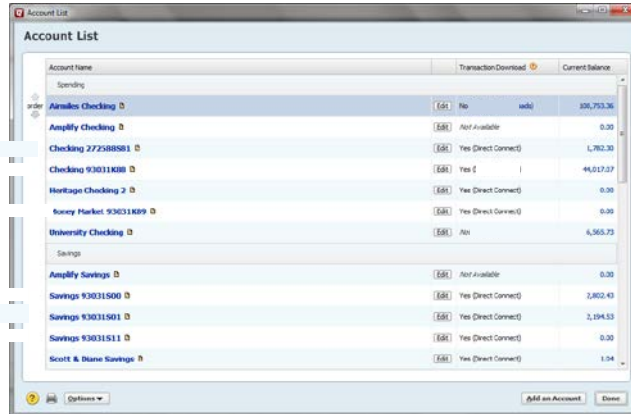
1. Select the **Tools** menu > **One Step Update**.

Please note: Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or you may enter individual passwords in the **One Step Update** window.

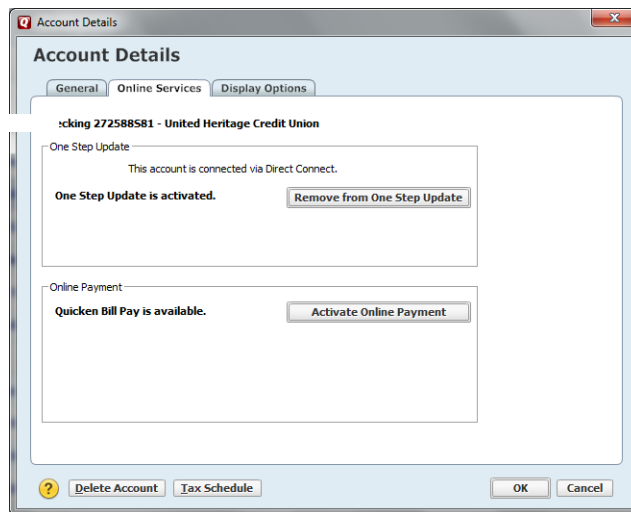
2. In the **One Step Update Settings** window, ensure all items are checked and select “Update Now”.
3. If new transactions display in the **Online Update Summary**, accept them in your Quicken account register.

### Task 3: Deactivate Your Account(s) At United Heritage Credit Union

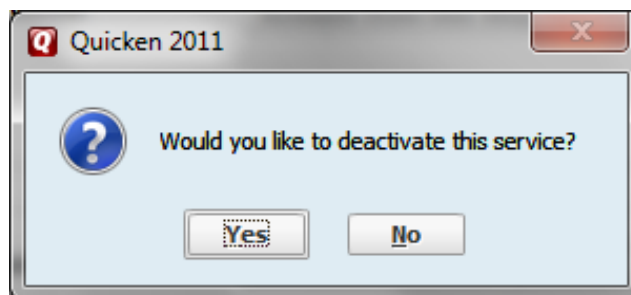
1. Select **Tools** menu > **Account List**.

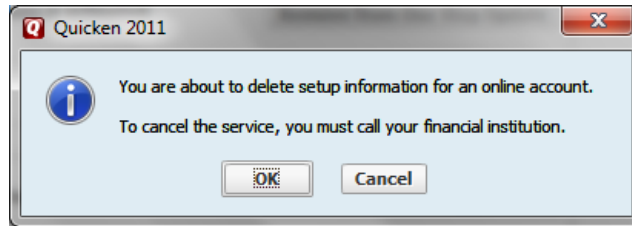


2. Select the "Edit" or "Edit Details" button of the account you want to deactivate.
3. In the **Account Details** window, select the **Online Services** tab.



4. If you do not use Web BillPay services, proceed to Step 5. If you use Web BillPay services, select "Deactivate" or "Deactivate Online Payment" (only available if you use Web BillPay services). Follow the prompts to confirm the deactivation.

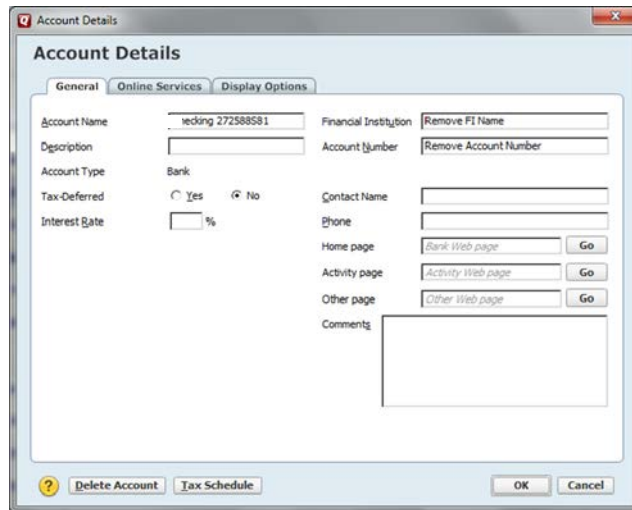




5. Select "Deactivate" or "Remove from One Step Update". Follow the prompts to confirm the deactivation.

Please note: The name of the buttons referenced above may vary slightly depending on the version of Quicken you are using.

6. Select the **General** or **General Information** tab.



7. Remove the Account Number and the name of the Financial Institution.
8. Select "OK".

Please note: Repeat steps for each account you have with United Heritage Credit Union.