

# Quicken Essentials for Mac Conversion Guide

Quicken Essentials for Mac 2010  
Direct Connect/Express Web Connect to Express Web Connect

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## 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

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### Task 1: Conversion Preparation

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1. Back up your data file.

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

2. Download the latest Quicken update.

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

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

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1. Select your account under the **Accounts** list on the left side.
2. Select **Accounts** menu > select “Update Selected Online Account”.

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

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

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1. Select your account under the **Accounts** list on the left side.
2. Select **Accounts** menu > **Settings**.
3. Remove the check mark from “I want to download transactions”.
4. Select **Save**.

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

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**Task 4: Re-activate Your Account(s) At United Heritage Credit Union**

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1. Select your account under the **Accounts** list on the left side.
2. Select **Accounts** menu > "Update Selected Online Account".
3. Select **List** menu > "United Heritage CU".
4. Select "Continue".

Please note: Select "Quicken Connect" for the **Connection Type** if prompted.

5. Select "Save".
6. Enter your sign in credentials for UHCU Online Banking.
7. Select "Continue".

Please note: In the **Choose your Accounts** screen, ensure you associate each account to the corresponding account listed in Quicken.

8. Under the **Action** column, select each account you wish to download into Quicken Essentials.

Please note: Do not select "ADD" under the action column.

9. Select "Continue".