# Quicken for Mac 2015-2017

*Express Web Connect*

## Introduction

As Georgia United Credit Union launches its new Online Banking platform, 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.

> **NOTE:** Express Web Connect uses the same User ID and Password as your Georgia United Online Banking account.

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.

> **IMPORTANT:**     Quicken Express Web Connect services may be interrupted up to 3-5 business days after the conversion is complete.

**Task 2:**     Disconnect accounts at **Georgia United Credit Union** on or after **October 24, 2017**

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 **Georgia United Credit Union - New** on or after **October 24, 2017**

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 *Georgia United Credit Union - New* 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**.