

# Quicken for Windows Conversion Guide

## Quicken for Windows 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 Your Data” and follow the instructions.

2. Download the latest Quicken update.

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

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### Task 2: Deactivate Your Account(s) at United Heritage Credit Union

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1. Select the **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. Select “Deactivate” or “Remove from One Step Update”.
5. 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.

**Task 3: Re-activate Your Account(s) at United Heritage Credit Union**

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1. Sign in to UHCU Online Banking at [uhcu.org](http://uhcu.org).
2. Download and import your transactions into Quicken from your history page.
3. Ensure you associate each account to the corresponding account listed in Quicken. Select "Link" to an existing account or "Use an Existing Quicken Account" and select the corresponding account in the dropdown menu.

Please note: Do not select "Create a new account" or "Create a new Quicken account". If you are presented with accounts you do not want to track in this data file, select "Ignore – Don't Download into Quicken" or select "Cancel".

Repeat steps for each account that you previously disabled.