

Quicken for Windows Conversion Instructions

Express Web Connect

Introduction

As **St Helens Community Financial Credit Union** completes its system conversion to **InRoads Credit Union**, 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.

To complete these instructions, you will need your login credentials for online banking.

NOTE: Express Web Connect uses the same User ID and Password as your financial institution's website.

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

 Backup your data file. For instructions to back up your data file, choose Help menu > Quicken Help. Search for *Backup Data File* and follow the instructions. Download the latest Quicken Update. For instructions to download an update, choose Help menu > Quicken Help. Search for Update Software and follow the instructions.

Task 2: Optional task - Complete a final download before 12/09/2018

- 1. Choose **Tools** menu > **One Step Update**.
- 2. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.
- 3. In the **One Step Update Settings** dialog, make sure all items are checked and click **Update Now**.
- 4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

Task 3: Disconnect Accounts in Quicken on or after 12/17/2018

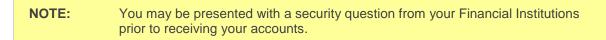
- 1. Choose **Tools** menu > **Account List**.
- 2. Click the **Edit** button of the account you want to deactivate.
- 3. In the Account Details dialog, click on the Online Services tab.
- 4. Click **Deactivate.** Follow the prompts to confirm the deactivation.
- 5. Click on the General tab.
- 6. Remove the financial institution name and account number. Click **OK** to close the window.
- 7. Repeat steps for each account to be disconnected.

Task 4: Reconnect Accounts to InRoads Credit Union on or after 12/17/2018

- 1. Choose **Tools** menu > **Account List**.
- 2. Click the **Edit** button of the account you want to activate.
- 3. In the Account Details dialog, click the Online Services tab.
- 4. Click **Set up Now**.
- 5. Use Advanced Setup to activate your account.
- 6. Enter *InRoads Credit Union* in the search field, select the name in the list and click Next.

NOTE: If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

- 7. If presented with the Select Connection Method screen, select **Express Web Connect**.
- 8. Enter your **User ID** and **Password**. Click **Connect**.



Ensure you associate the account to the appropriate account already listed in Quicken. You will
want to select Link to an existing account and select the matching accounts in the drop-down
menu.

IMPORTANT: Do **NOT** select **Add to Quicken** unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

- 10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
- 11. Click Done or Finish.