

# Quicken for Mac Conversion Instructions

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*Quicken™ for Mac 2015*

*Web Connect to Express Web Connect*

## Introduction

As **United Community Bank** completes its system conversion to **the new Online Banking system**, 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 **User ID and Password** for the **old and new Online Banking** systems.

**NOTE:** Quicken Web Connect/Express Web Connect accounts use the same User ID and PIN/Password as **the old Online Banking** system.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, 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. 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.

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### Task 2: Connect to **the old Online Banking site** for a final download **two business days before you are converted to the new Online Banking**

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1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Enter **United Community Bank** in the Search field and click **Continue**.
4. Log in to **the old Online Banking URL**.
5. **Download** a file of your transactions to your computer.

**IMPORTANT:** Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

6. Drag and drop the downloaded file into the box **Drop download file**.

**NOTE:** Select “Web 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. Click **Continue**.

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**Task 3:** Deactivate Your Account(s) *on the old Online Banking site after you perform Task 2 above*

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1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Remove the checkmark from “**I want to download transactions.**”
4. Click **Save**.
5. Click **Continue** when asked to confirm this deactivation.
6. Repeat steps 2–5 for each account *on the old Online Banking site*.

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**Task 4:** Re-activate Your Account(s) *on the new Online Banking site on or after you are converted to the new Online Banking system*

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1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Check the box “**I want to download transactions**” and click **Assist me**.
4. Enter **United Community Bank** in the Search field and click **Continue**.
5. Type your **User ID** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

**NOTE:** Select “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. Repeat step 7 for each additional account you wish to download into Quicken.
9. Click **Continue**.

*Thank you for making these important changes!*