

Quicken for Mac Conversion Instructions

Quicken™ for Mac

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 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

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.

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**

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) you use for online banking or investing.

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

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 *on the old Online Banking site*.

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

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 *United Community Bank* 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**.

Thank you for making these important changes!