

# Quicken for Windows Conversion Instructions

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## *Express Web Connect*

### Introduction

As HealthCare Associates Credit Union completes its digital banking upgrade from Internet Branch to My247, 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 Username and Password for HealthCare Associates Credit Union's My247 Digital Banking.

**NOTE:** **Express Web Connect** uses the same Username and Password as your My247.

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

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

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**Task 2:** Disconnect Accounts at HealthCare Associates Credit Union on or after January 9, 2018.

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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.

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**Task 3:** Reconnect Accounts to HealthCare Associates Credit Union on or after January 17, 2018.

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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 HealthCare Associates Credit Union in the search field, select the name in the list and click **Next**.
7. If presented with the Select Connection Method screen, select **Express Web Connect**.
8. Enter your **Username** and **Password**. Click **Connect**.

**NOTE:** You may be presented with a security question from your My247 prior to receiving your accounts.

9. 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**.