

## Quickbook (Windows) Guide

### Step 1: Match Downloaded Transactions

1. In order to continue with the troubleshooting, all accounts that have a red flag next to them need to be resolved.
2. Go through each account on the left nav bar and resolve each account by accepting all downloaded transactions. If it asks to reconcile accounts, you can take the time to do that, or click **finish later**.


### Step 2: Deactivate Your Account(s) from UCCU's Old Server

1. Create a backup of your Quicken accounts.  
<https://www.quicken.com/support/how-backup-or-restore-your-quicken-data>
2. Deactivate each UCCU account.
  - Select the **Tools** menu and select **Account List**
  - Select the account you need to deactivate (all that mention **zzz Utah Community Credit Union**) and click **Edit**
  - In the Account Details window, click the **Online Services** tab
  - Click **Deactivate**
  - Click **Yes** to the message asking if you want to disable this service.
3. Go through all accounts that were previously connected to zzz Utah Community Credit Union and make sure all accounts are deactivated. Ensure any hidden accounts are deactivated as well. **The reconnection will not work if there is even one account still connected.** If the financial institution says "UCCU Online Web Downloads Only" follow the guide in the FAQs.
4. Make a note of the date of the last transaction downloaded into each account.
5. This step may be slightly different for the type of software you are using. Reference this link for additional information: <https://www.quicken.com/support/deactivate-online-banking-services-quicken-account>

### Step 3: Reconnect Your Account(s) at UCCU

1. Download an account history from UCCU Online Banking.

**Most connectivity problems can be resolved by following the detailed instructions above. If you need further assistance, you can contact Intuit directly at 1 (800) 446-8848. Another option is to schedule a call with a UCCU representative for assistance at (801) 223-8188.**

- Navigate to [www.uccu.com](http://www.uccu.com) through your browser
- Enter your Login ID and click **Login**
- Enter your password and click **Submit**
- Select the account tile for the account you would like to connect with Quicken
- Click **Filters** to edit the date range for transactions
- Click the dropdown button for **Time Period** and click on **Custom Date**
- **Start Date:** Select the day before the last downloaded transaction in Quicken for that account
- **End Date:** Select either April 7, 2017, or leave blank to download all transactions through today (For a marginally quicker upload, select April 7, 2017 date.)
- Click **Apply Filters**
- Click the **Download** button that looks like an arrow pointing down 
- Select **Quicken (qfx)** as the download type
- Save the file where you can find it if you have the option, or find where the file was saved so you can access it in later steps (If importing several account histories, edit the file names to correspond with accounts.)

## 2. Import file into Quicken

- Click **File**
- Click **File Import**
- Select **Web Connect File**
- Select the previously saved **.qfx** file
- Click **Link to Existing Account** and select the existing account name in the dropdown menu that follows
- Click **Continue**

## 3. After the import, open the account. **Accept all** downloaded transactions.

### **Step 4: Attempt to Improve Connection for UCCU Account(s):**

#### 1. In Quicken

- Choose **Tools** menu > **Account List**
- Click the blue **Improve Connection** button next to the word **Yes**
- Enter the Login ID and Password you use to log in to [www.uccu.com](http://www.uccu.com)
- A green rotating wheel will pop up. This can take 20 minutes or more to establish connection.
- Designate which UCCU accounts you want to **Link, Add, or Ignore**. (Link: Make sure the incoming account name matches the linking account name.)
- Check in the **Account List** that the connection type now says **Express Web Connect**

#### 2. If attempt is unsuccessful, import more account histories and try again

#### 3. If attempt is successful, **Accept All** downloaded transactions

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