

## Quicken for Windows

**Beginning 6/22/2018, you will be able to reconnect to your First United Bank accounts in the new online banking system with your Intuit products (QuickBooks, Quicken, Mint, etc.).**

## Express Web Connect

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### Task 1: Disconnect Accounts at *First United Bank & Trust*

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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 2: Reconnect Accounts to *First United Bank & Trust* on or after **6/22/2018** (*this refreshes the system*)

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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 **First United Bank & Trust** 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 **User ID** and **Password**. Click **Connect**.

**NOTE:** You may be presented with a security question from your Financial Institutions 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**.

## Quicken for Mac 2015-2017

**Beginning 6/22/2018, you will be able to reconnect to your First United Bank accounts in the new online banking system with your Intuit products (QuickBooks, Quicken, Mint, etc.).**

### *Express Web Connect*

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**Task 1: Disconnect Accounts at *First United Bank & Trust***

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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 to be disconnected.

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**Task 2: Reconnect Accounts to *First United Bank & Trust* on or after 6/22/2018 (*this refreshes the system*)**

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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 ***First United Bank & Trust*** 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**.