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.).

Web Connect

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

---

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.

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

---

1. Download your Quicken Web Connect file from *FirstUnitedBank.com*.

> **NOTE:** Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

2. Click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.

3. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

Do **NOT** select **Create a new account** 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** or click the **Cancel** button.

4. Repeat steps for each account to be reconnected.

Quicken for Mac 2007

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.).

Web Connect

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

---

1. Choose **Lists** menu > **Accounts**.

2. Select the account to deactivate and click **Edit**.

3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.

4. Remove the information within the **Account Number** and **Routing Number** fields.

5. Click **OK** to save your edits.

6. Repeat steps 2 – 5 for each account to be disconnected.

7. Verify your account list does not display a blue online circle icon for the accounts you are disconnecting.

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

---

1. Download your Quicken Web Connect file from *FirstUnitedBank.com*.

   > **NOTE:** Take note of the date you last had a successful connection. If you have overlapping dates in the Web Connect import, you may end up with duplicate transactions.

2. Import your transactions to Quicken.

3. Associate the account to the appropriate account already listed in Quicken. Select **Use an existing account**.

4. Match the transactions you are importing to the corresponding existing Quicken account in the drop-down list and click **OK**.

5. Repeat steps for each account to be reconnected.

6. Choose **Lists** menu > Accounts. Verify each account at *First United Bank & Trust* has a blue online circle indicating it has been reactivated for online services.

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.).

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Update Selected Online Account**.

3. Repeat steps 1 & 2 for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

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

---

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* on or after *6/22/2018* in the **Search** field, select the name in the **Results** list, and click **Continue**.

5. Log in to *FirstUnitedBank.com.* **Download** a file of your transactions to your computer.

NOTE:	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 unless you intend to add a new account to Quicken.

8. Click **Finish**.

9. Repeat steps for each account to be connected.