

## 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.).**

### *Direct 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 intend to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click on **Deactivate** or **Deactivate Online Payment** (only available if you use bill pay services). 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 you are disconnecting.

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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 **Direct Connect**.
8. Type your Direct Connect **User ID** and **Password** and click **Connect**.
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.
10. Do NOT choose **Add to Quicken** unless you want to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, choose **Ignore – Don't Download into Quicken**.
11. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.

12. Click **Done** or **Finish**.

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**Task 3:** Recreate Online Payments at ***First United Bank & Trust***

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If you are **not** a Bill Pay user within Quicken, your conversion is complete. Skip this Task.

1. Recreate your payments.
2. If you need help creating your payments, choose **Help menu > Quicken Help**.
3. Search for “**Create an online payment**” and click that item.
4. Follow the instructions to enter or transmit an online payment.

# Quicken for Mac 2007

## Conversion Instructions

**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.).**

### *Direct Connect*

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

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1. Choose **Lists** menu > **Accounts**.
2. Select the account that you want to disable and click **Edit**.
3. Write down your account information (account number, routing number, and customer ID).

**NOTE:** You will need this information to re-enable your account.

4. If you use online payment services, then select **Not Enabled** in the **Pay Bills Online** drop-down list. Follow the prompts to confirm the deactivation.
5. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
6. Remove the information within the **Account Number** and **Routing Number** fields.
7. Click **OK** to save your edits.
8. Repeat steps for each account to be disconnected.
9. Verify your account list does not display a blue online circle icon for any accounts at *First United Bank & Trust*.

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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 **Lists** menu > **Accounts**.
2. Select your first disabled account and click **Edit**.
3. Click the **Financial Institution** drop-down list and select **Change Financial Institution**.
4. Click on **Update List**.
5. In the **Financial Institutions** dialog, enter, then select *First United Bank & Trust DC* from the list and click **Use**.
6. Enter your Direct Connect **User ID** and **Password**. Click **OK**.

7. In the **Add Online Services** dialog, match your first account to the appropriate account number. Click **OK**.

**NOTE:** Each account will be displayed below **“Use an existing account.”**

8. Click **OK**.
9. Click OK to close the **Edit Register** page.
10. Choose **Lists** menu > **Accounts**. Verify that each account you are reactivating has a blue online circle for online services.

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**Task 3:** Recreate Online Payments at *First United Bank & Trust*

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If you are **not** a Bill Pay user in Quicken, your conversion is complete. Skip this Task.

1. Recreate your payments.
2. If you need help creating your payments, choose **Help** menu > **Search**.
3. Search for “Entering an Online Payment” and click that item.
4. Follow the instructions to enter or transmit an online payment.

# Quicken for Mac 2015-2017

## Conversion Instructions

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**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.).**

### *Direct 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 institution name in the **Results** list and click **Continue**.
5. Enter your Direct Connect **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

**NOTE:** Select "Direct Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, 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. Select **Finish**.

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#### **Task 3:** Recreate Online Payments at *First United Bank & Trust* (*Not available in Mac 2015*)

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If you are **not** a Bill Pay user within Quicken, your conversion is complete. Skip this Task.

1. Recreate your payments.

2. If you need help creating your payments, click on **Help** in the top menu.
3. Search for “**Adding online Bill Pay transactions**” and click that item.
4. Follow the instructions to enter or transmit an online payment.