Quicken for Windows

Conversion Instructions

Express Web Connect

Introduction

Due to our digital banking upgrade, you will need to modify your Quicken settings to ensure the smooth transition of your data.

Before performing the below steps, please log into your account directly at www.inspiruscu.org.

NOTE:	**Express Web Connect** uses the same User ID and Password as your financial institution's website.

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

Task 1: Disconnect your existing Inspirus CU login

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 to your Inspirus CU account

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 *Inspirus 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 **User ID** and **Password**. Click **Connect**.

> **NOTE:**   You may be presented with additional security steps to access your account.

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**.