

## Using Express Web Connect for **Patelco Online™** with Windows

Follow these steps to access your Patelco account(s) using Quicken's Express Web Connect.

1. In Quicken, choose **Tools** menu > **Account List**.
  2. Select the **Edit** button of the account you want to activate. (You must have previously created account(s) using the **Add to Quicken** function within the Quicken software.)
  3. In the Account Details dialog, select the **Online Services tab**.
  4. Select **Set up Now**.
  5. Use **Advanced Setup** to activate your account.
  6. Enter *Patelco Credit Union-WC* and select **Next**.
  7. If presented with the Select Connection Method screen, select **Express Web Connect**.
  8. Enter your **Patelco Online™ User ID** and **Password**. Select **Connect**.
- NOTE: You may be presented with a security question prior to receiving your account information in Quicken.
9. Ensure you associate the Patelco 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. 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, select **Next**. You will receive confirmation that your accounts
  11. Select **Done or Finish**.