



## 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 **Deactivate**.
5. Select **Set up Now** within Online Setup section
6. Select the **Advanced Setup** link to use Advanced Setup to activate your account.
7. Select **I want to select the connection method used to download my transactions**.
8. In the box, enter Patelco Credit Union-WC and then select the **Next** button.
9. If presented with the Select Connection Method screen, select the **Express Web Connect** button.
10. Select the **Next** button.
11. 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.

12. 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**.
13. After all accounts have been matched, select **Next**. You will receive confirmation that your account has been added.
14. Select **Done** or **Finish**.

