If you’re not using your Patelco Online™ User ID in Quicken, you need to update now. (For instance, if you’re using your Member Number or the username from our old online banking system, you need to begin using your Patelco Online™ User ID.) Follow our handy guide, and you’ll be all set to keep getting your transactions. Don’t worry – you won’t lose any of your old transactions.

Your Patelco Online™ User ID is what you use to log in to our Mobile App and our online banking at patelco.org.

Don’t have a Patelco Online™ User ID? Visit patelco.org from any device and select Sign Up at the top. You'll need your Member Number to get started.

1. Once you have your Patelco Online™ User ID, open your Quicken software (on a Mac computer) and go to your account list
2. Right click on your first Patelco account and select **Edit “Account Name” Settings**
3. Select **Change Connection Type**
4. Begin typing **Patelco** in the search box search box and then select **Patelco Credit Union** from the results.

5. Select **Continue**
6. Enter your **Patelco Online™** credentials – the same ones you use to log in to the Mobile App or **patelco.org** (this is not your member number!)

7. Select **Continue**
8. If correct Patelco Online™ credentials have been used, you’ll see a list of your accounts – something like the example below.

9. Select **Continue**
10. Select Finish
11. To validate the changes, right click on your Patelco account and select 
**Edit “Account Name” Settings**
12. Start typing **Patelco Credit Union** in the search box and then select **Patelco Credit Union** from the results.

13. Select **Continue**
14. Verify that your Patelco Online™ User ID is displayed as the Customer ID (and that your member number is not showing)

15. Select **Cancel** to close the pop-up
16. Repeat the above for each of your Patelco accounts that you manage with Quicken

17. Close and re-start your Quicken software

18. Have Quicken update your Patelco transactions as normal — and if you have any issues contact us at **800.358.8228**