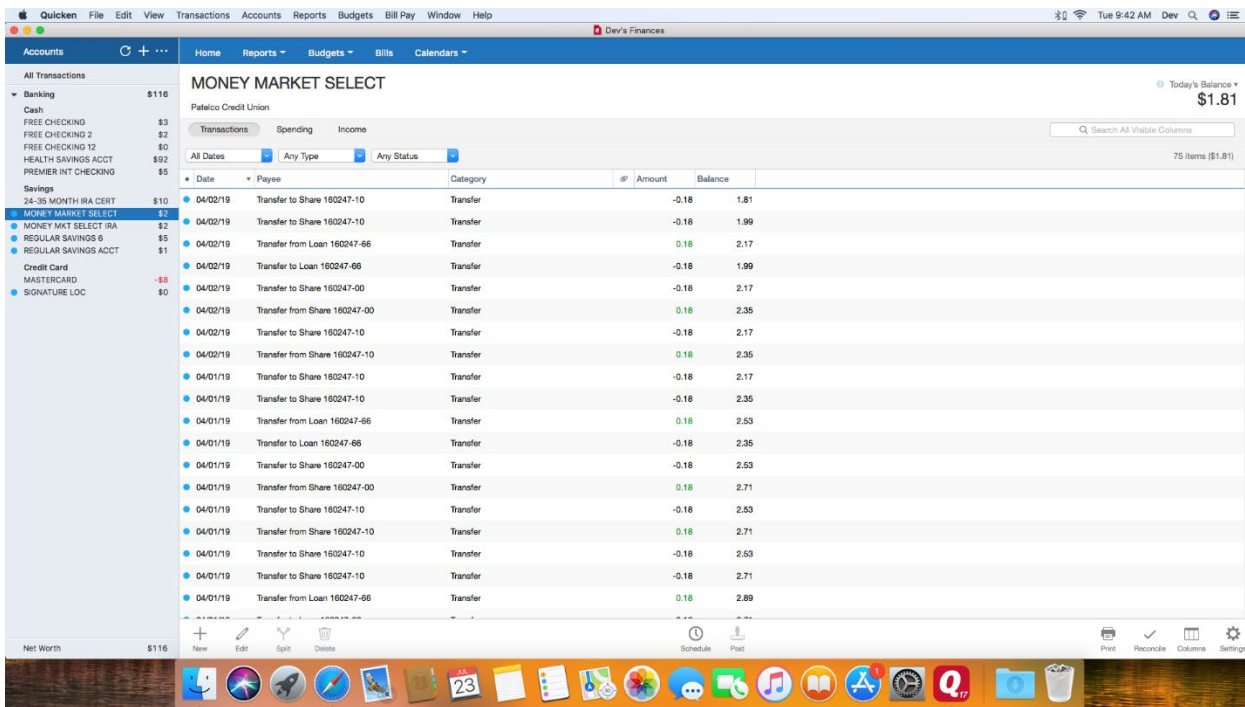


If you're not using your **Patelco Online™** User ID in Quicken, you need to update now. (For instance, if you're using your Member Number or the username from our old online banking system, you need to begin using your Patelco Online™ User ID.) Follow our handy guide, and you'll be all set to keep getting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

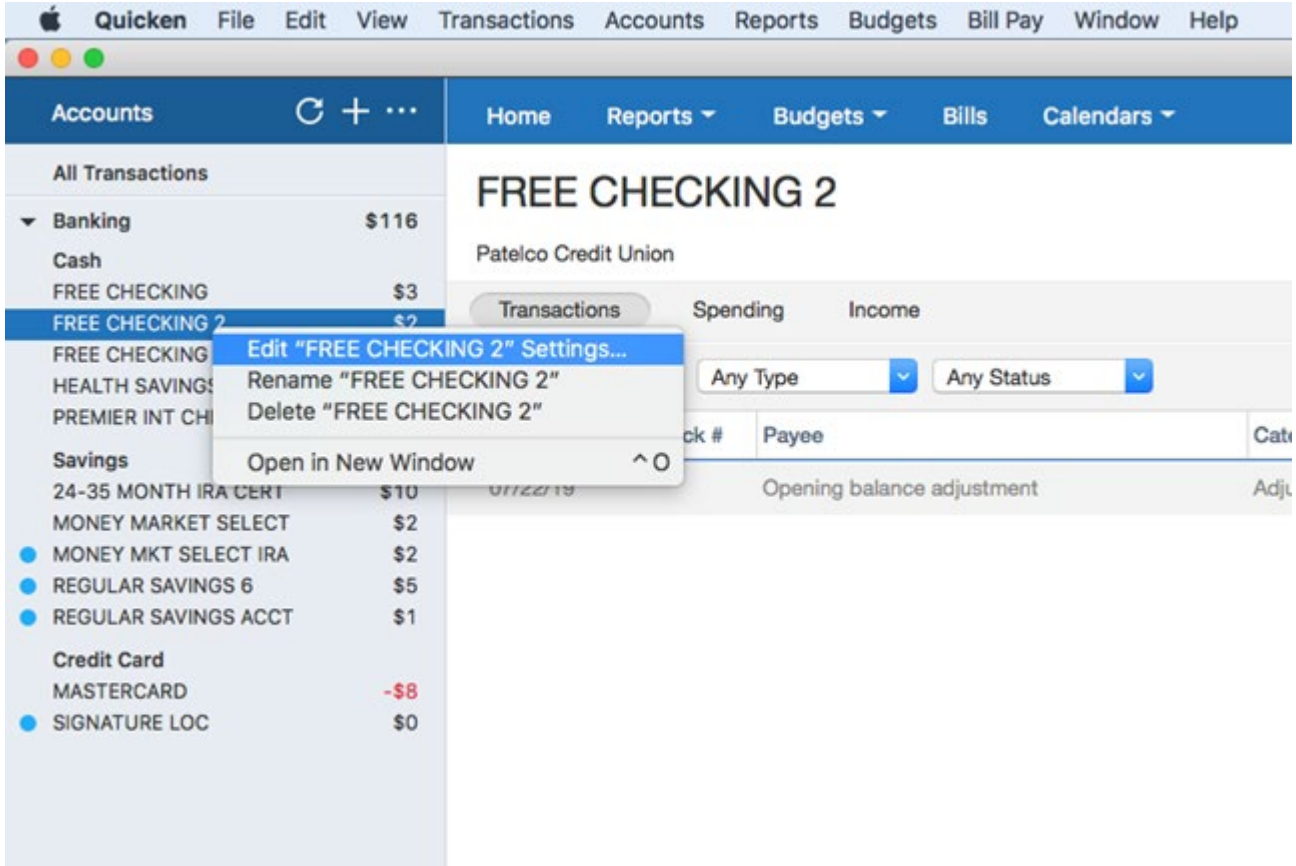
Your **Patelco Online™** User ID is what you use to log in to our Mobile App and our online banking at patelco.org.

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.

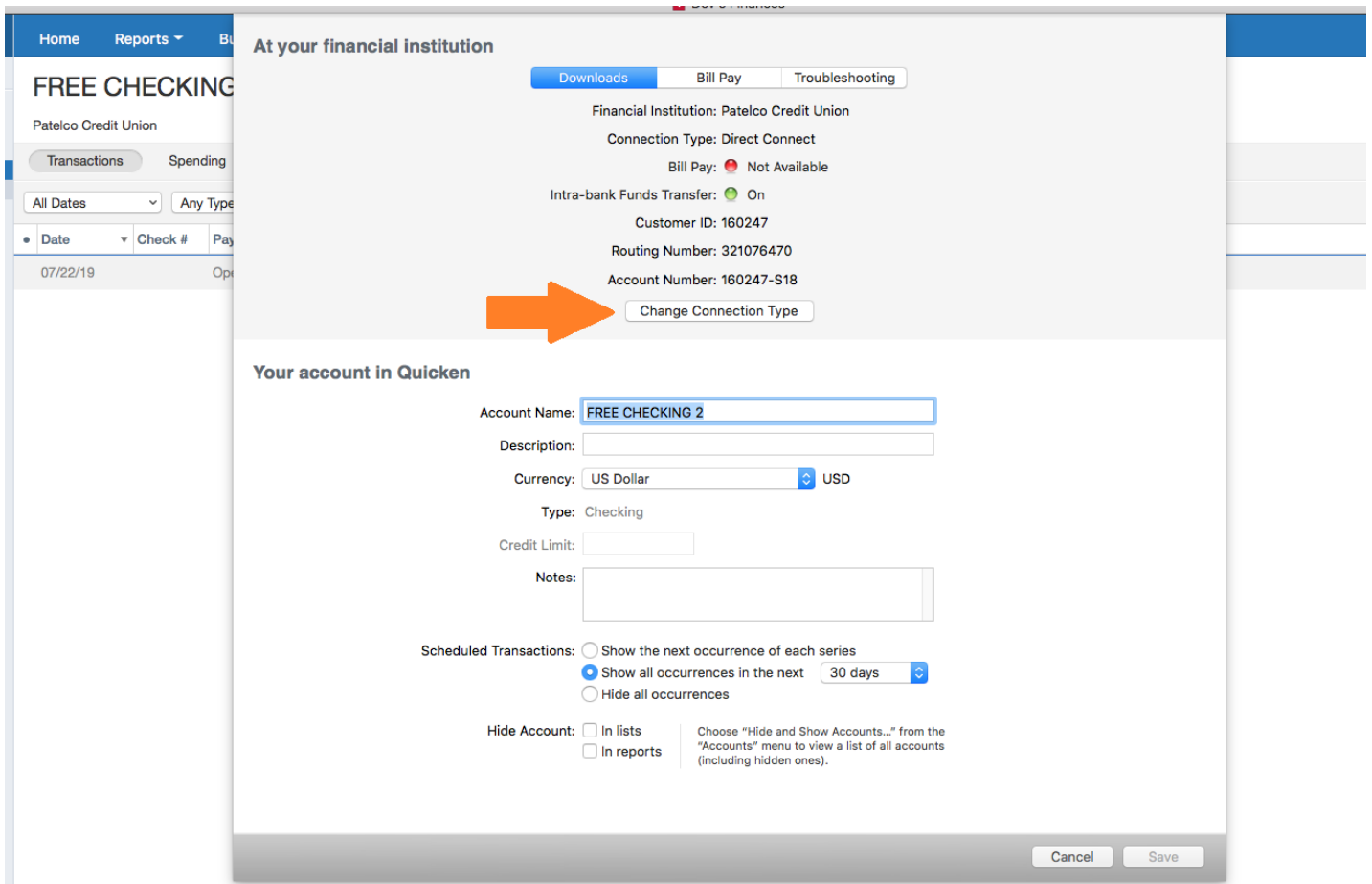
1. Once you have your **Patelco Online™** User ID, open your Quicken software (on a Mac computer) and go to your account list





2. Right click on your first Patelco account and select **Edit "Account Name" Settings**



3. Select Change Connection Type



The screenshot shows the Quicken interface for a 'FREE CHECKING' account at Patelco Credit Union. The 'At your financial institution' section contains the following information:

- Downloads | Bill Pay | Troubleshooting
- Financial Institution: Patelco Credit Union
- Connection Type: Direct Connect
- Bill Pay:  Not Available
- Intra-bank Funds Transfer:  On
- Customer ID: 160247
- Routing Number: 321076470
- Account Number: 160247-S18
- Change Connection Type** (button)

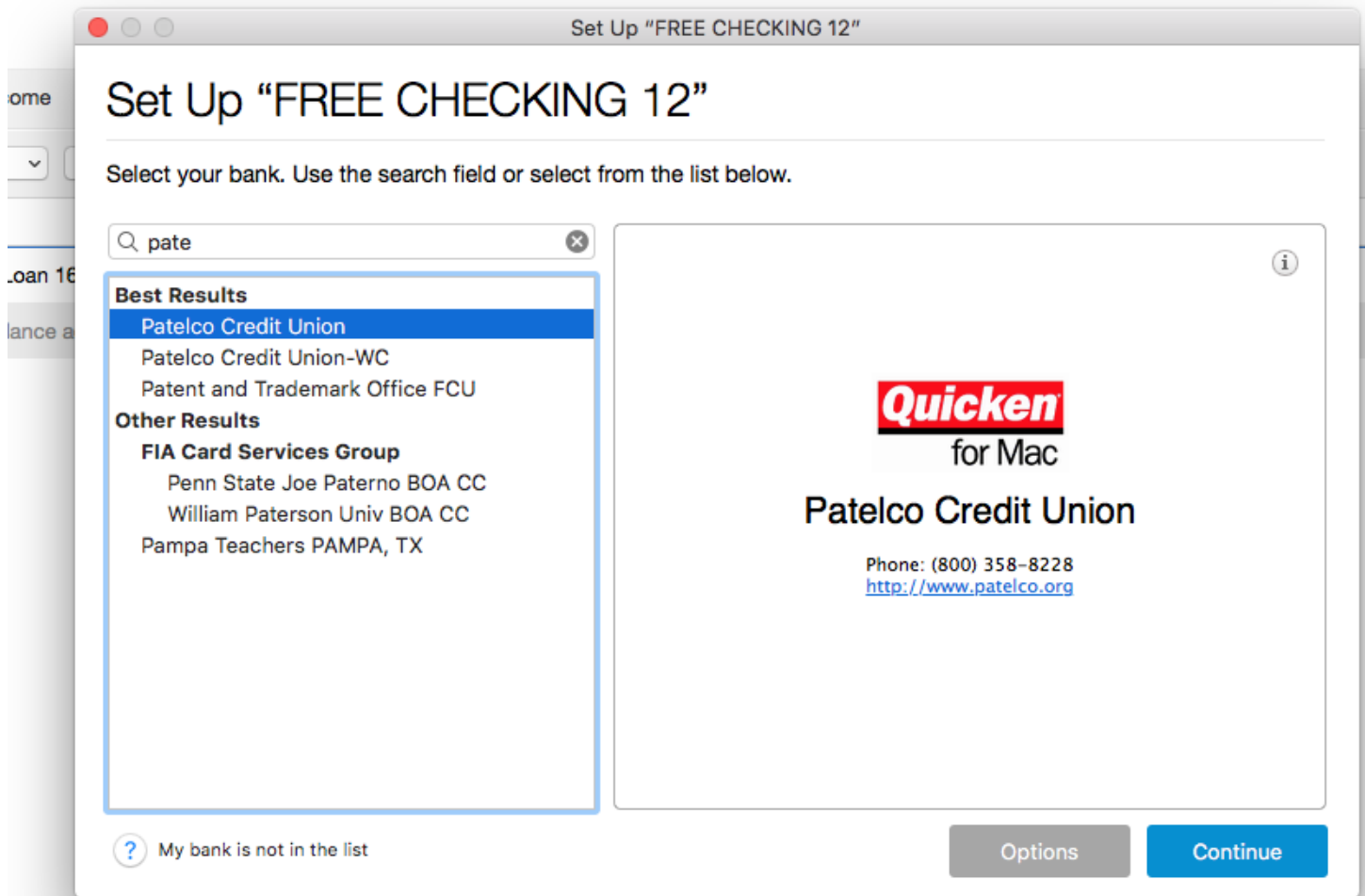
An orange arrow points to the 'Change Connection Type' button. Below this section is the 'Your account in Quicken' section with the following fields:

- Account Name:
- Description:
- Currency: USD
- Type: Checking
- Credit Limit:
- Notes:
- Scheduled Transactions: Show the next occurrence of each series, Show all occurrences in the next 30 days, Hide all occurrences
- Hide Account: In lists, In reports

At the bottom right of the form are 'Cancel' and 'Save' buttons.



4. Begin typing **Patelco** in the search box search box and then select **Patelco Credit Union** from the results

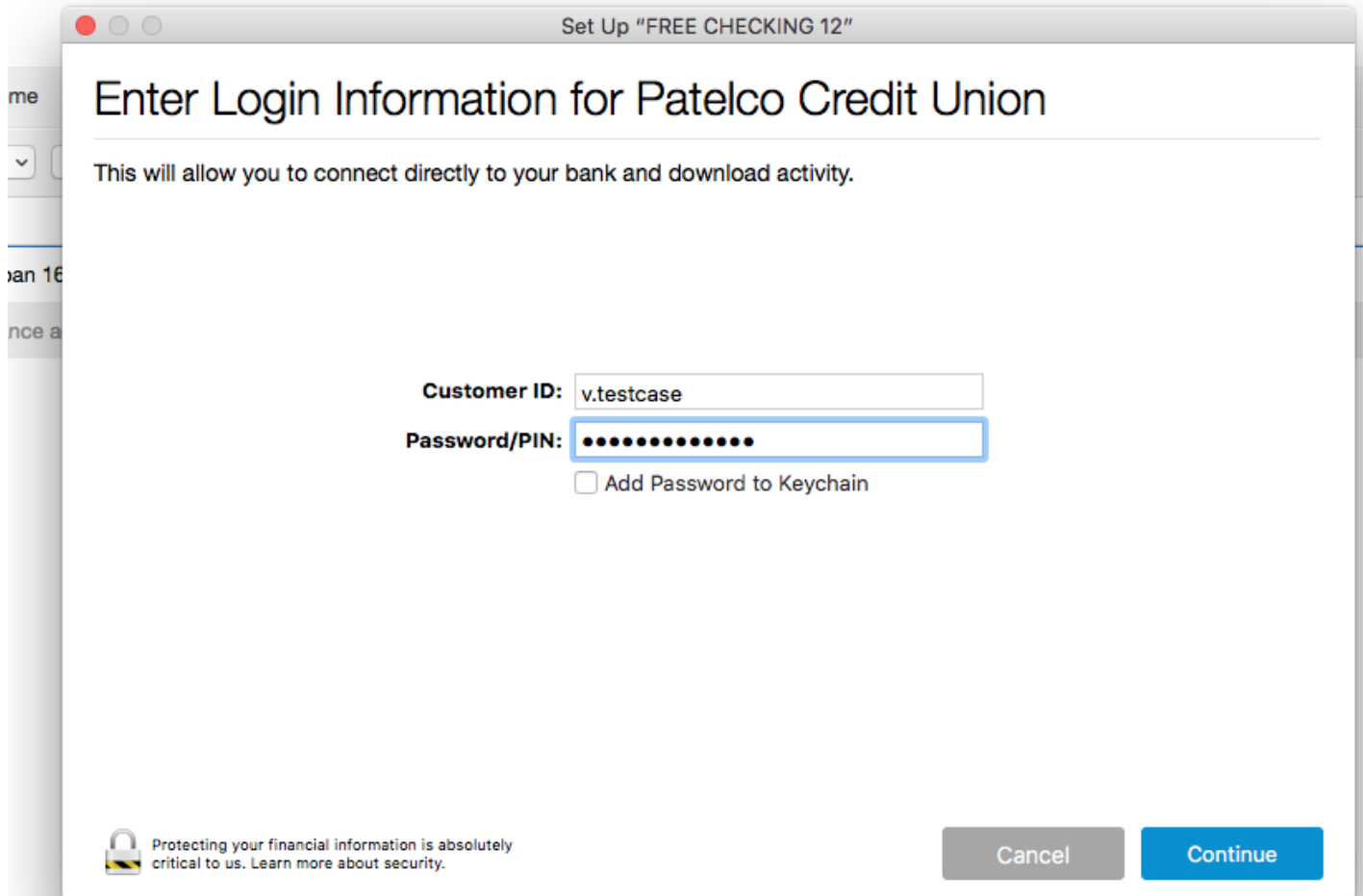


5. Select **Continue**





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!)



Set Up "FREE CHECKING 12"


Enter Login Information for Patelco Credit Union

This will allow you to connect directly to your bank and download activity.

Customer ID:

Password/PIN:

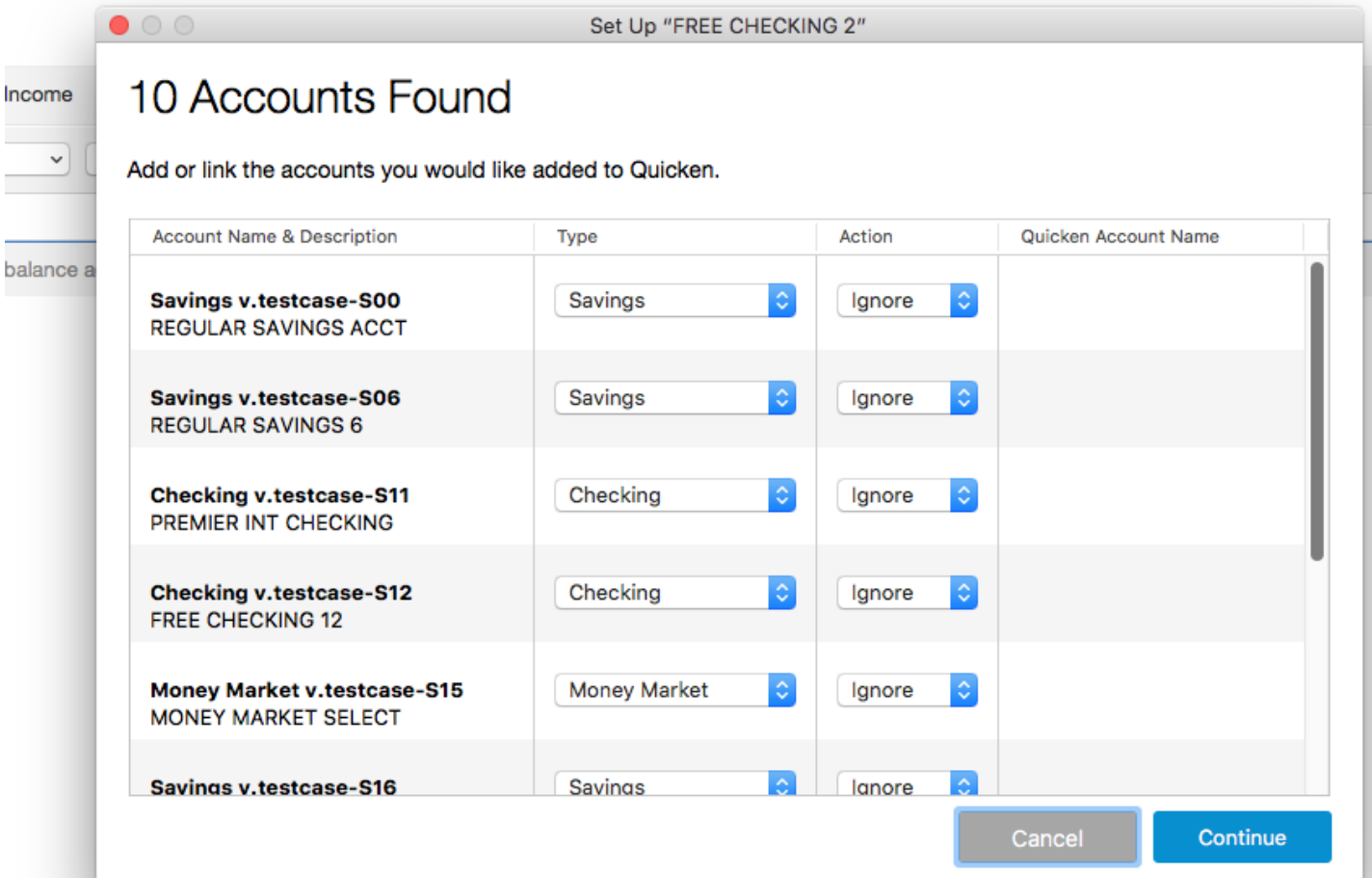
Add Password to Keychain

 Protecting your financial information is absolutely critical to us. [Learn more about security.](#)

7. Select **Continue**



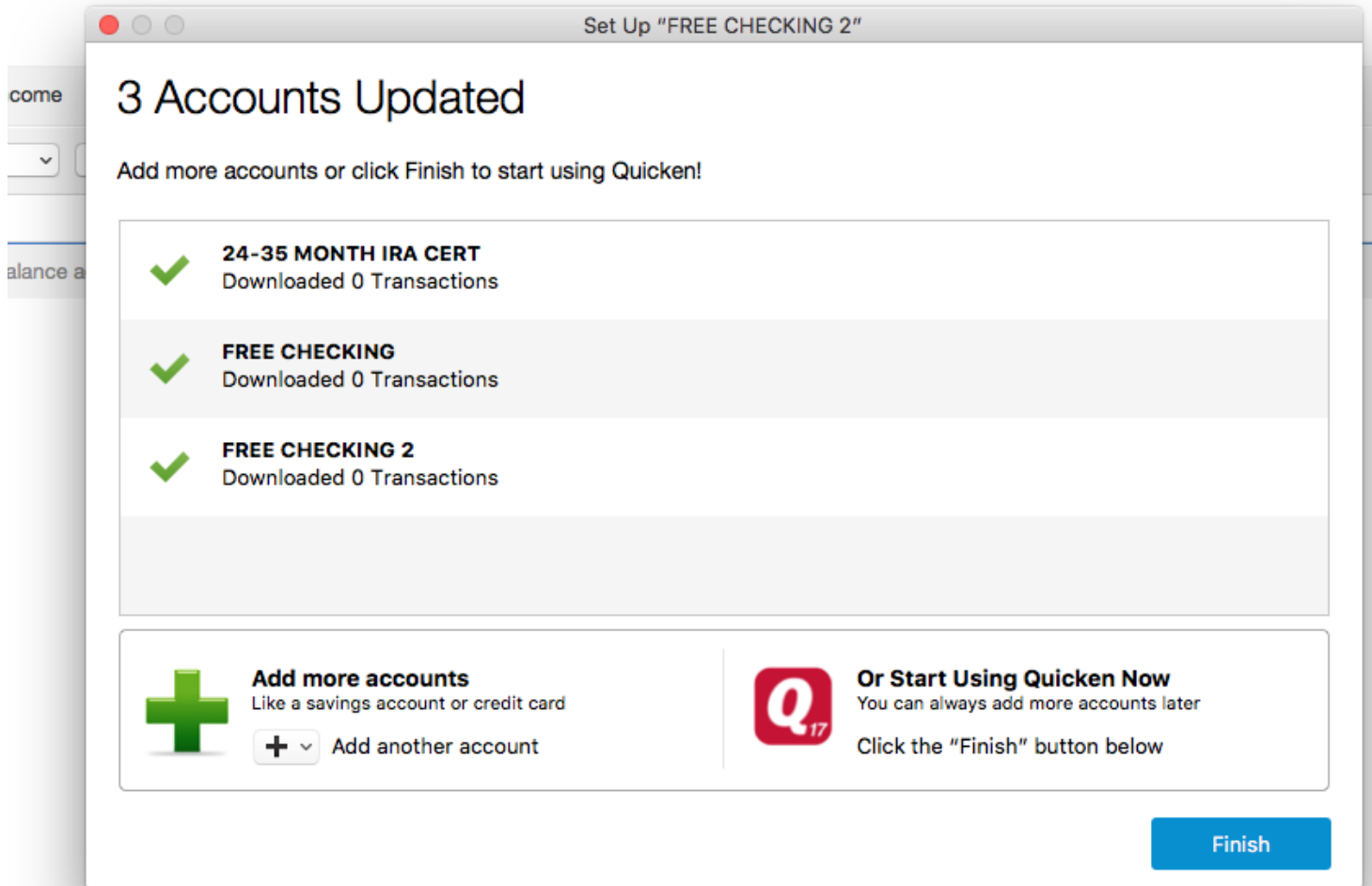
8. If correct **Patelco Online™** credentials have been used, you'll see a list of your accounts – something like the example below



9. Select **Continue**



10. Select **Finish**



The screenshot shows a window titled "Set Up 'FREE CHECKING 2'". The main heading is "3 Accounts Updated". Below this, it says "Add more accounts or click Finish to start using Quicken!". There is a list of three accounts, each with a green checkmark and the text "Downloaded 0 Transactions":

- 24-35 MONTH IRA CERT
- FREE CHECKING
- FREE CHECKING 2

At the bottom, there are two options:

- Add more accounts**: Like a savings account or credit card. Includes a green plus icon and a "+ v" button. Text: "Add another account".
- Or Start Using Quicken Now**: You can always add more accounts later. Includes the Quicken logo (a red square with a white 'Q' and '17' below it). Text: "Click the 'Finish' button below".

A blue "Finish" button is located at the bottom right of the window.





11. To validate the changes, right click on your Patelco account and select **Edit “Account Name” Settings**

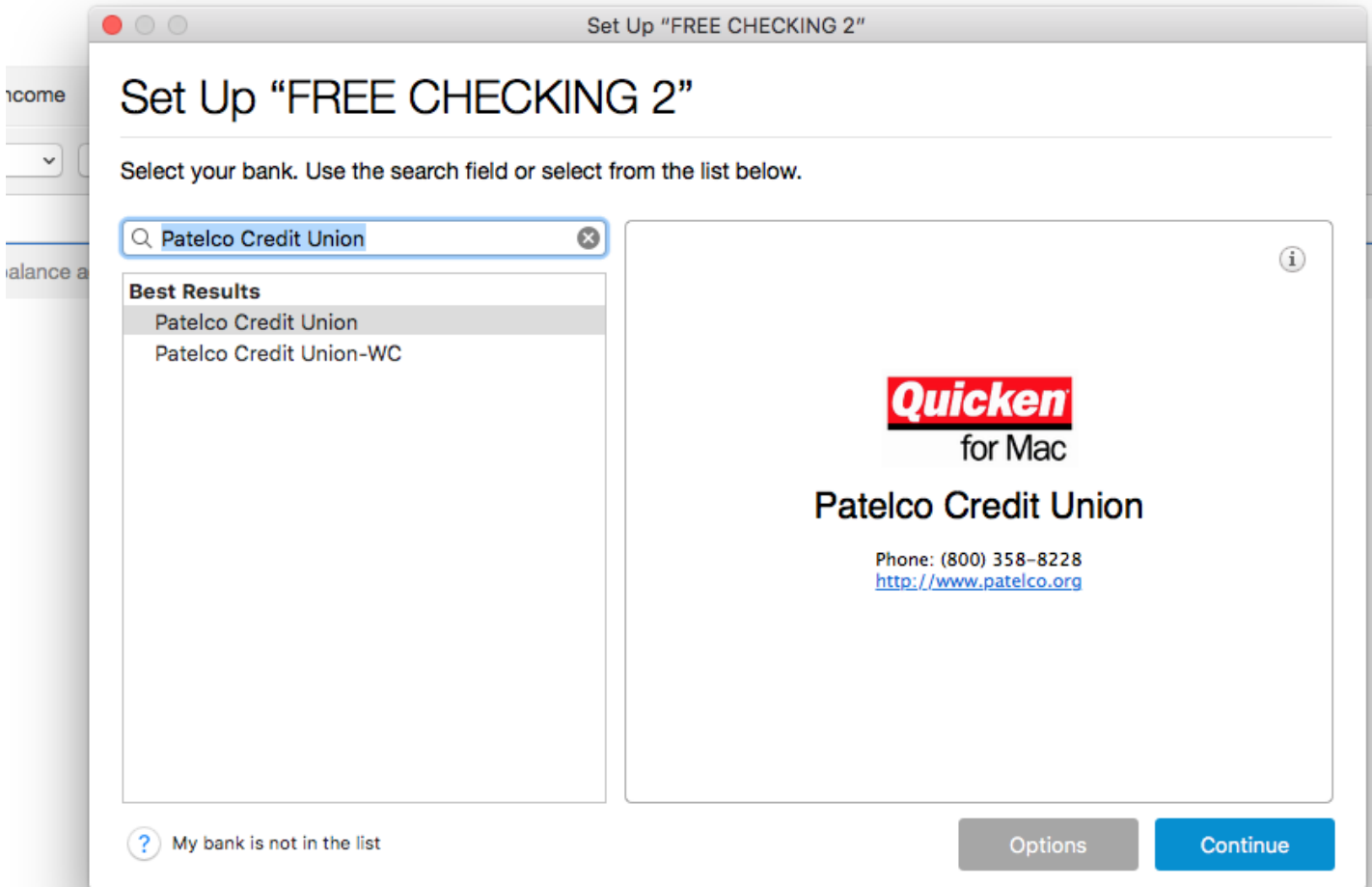
The screenshot displays the Quicken application interface. On the left, the 'Accounts' list is visible, showing various accounts under categories like Banking, Cash, Savings, and Credit Card. The 'FREE CHECKING 2' account is highlighted, and a context menu is open over it. The context menu options are:

- Edit "FREE CHECKING 2" Settings...
- Rename "FREE CHECKING 2"
- Delete "FREE CHECKING 2"
- Open in New Window

The background shows the account details for 'FREE CHECKING 2' at Patelco Credit Union, including a balance of \$3 and a transaction table with columns for Date, Payee, and Category.



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)

Reports Budgets Bill Pay Window Help

Dev's Finances

At your financial institution


Downloads Bill Pay Troubleshooting

Financial Institution: Patelco Credit Union

Connection Type: Direct Connect

Bill Pay: ● Not Available

Intra-bank Funds Transfer: ● On

Customer ID: tcase 

Routing Number: 321076470

Account Number: v.testcase-S18

Change Connection Type

Your account in Quicken

Account Name:

Description:

Currency: USD

Type: Checking

Credit Limit:

Notes:

Scheduled Transactions: Show the next occurrence of each series
 Show all occurrences in the next
 Hide all occurrences

Hide Account: In lists In reports

Choose "Hide and Show Accounts..." from the "Accounts" menu to view a list of all accounts (including hidden ones).

Cancel Save

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**

