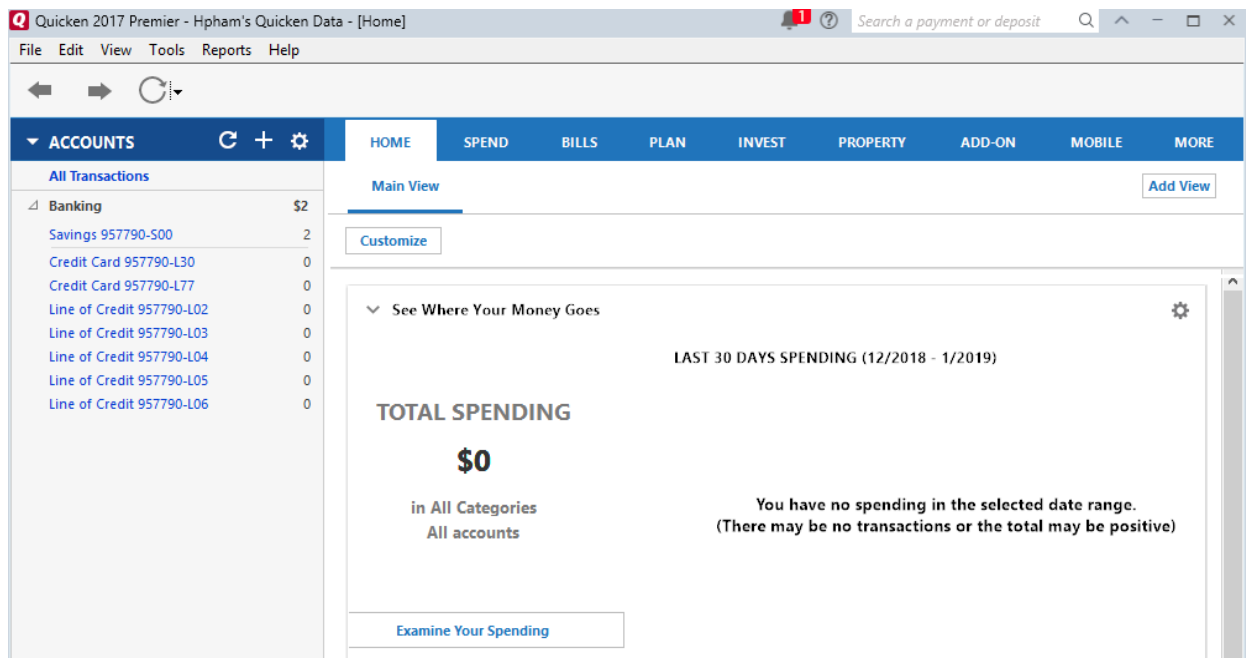


If you're not using your **Patelco Online™** User ID in Quicken, you need to update now. (For instance, if you're using your Member Number or the username from our old online banking system, you need to begin using your **Patelco Online™** User ID.) Follow our handy guide, and you'll be all set to keep 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](https://patelco.org).

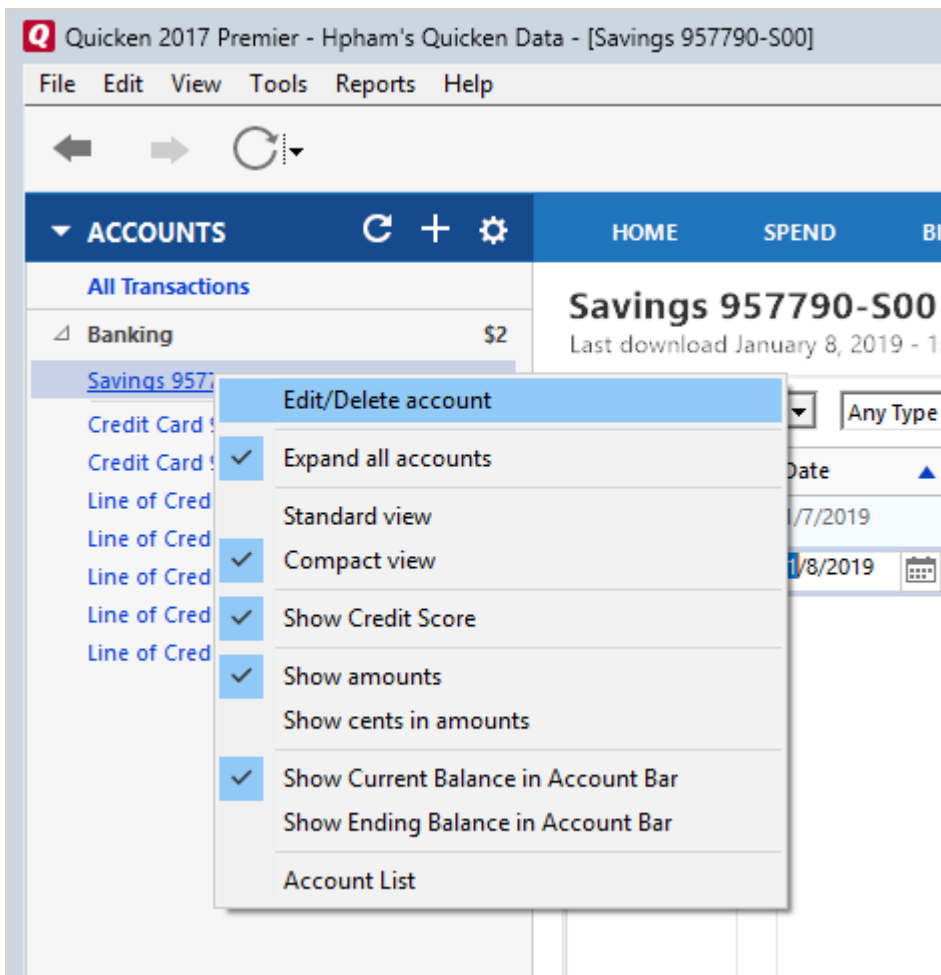
Don't have a **Patelco Online™** User ID? Visit [patelco.org](https://patelco.org) from any device and select **Sign Up** at the top. You'll need your Member Number (listed on your monthly statement) to get started.

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

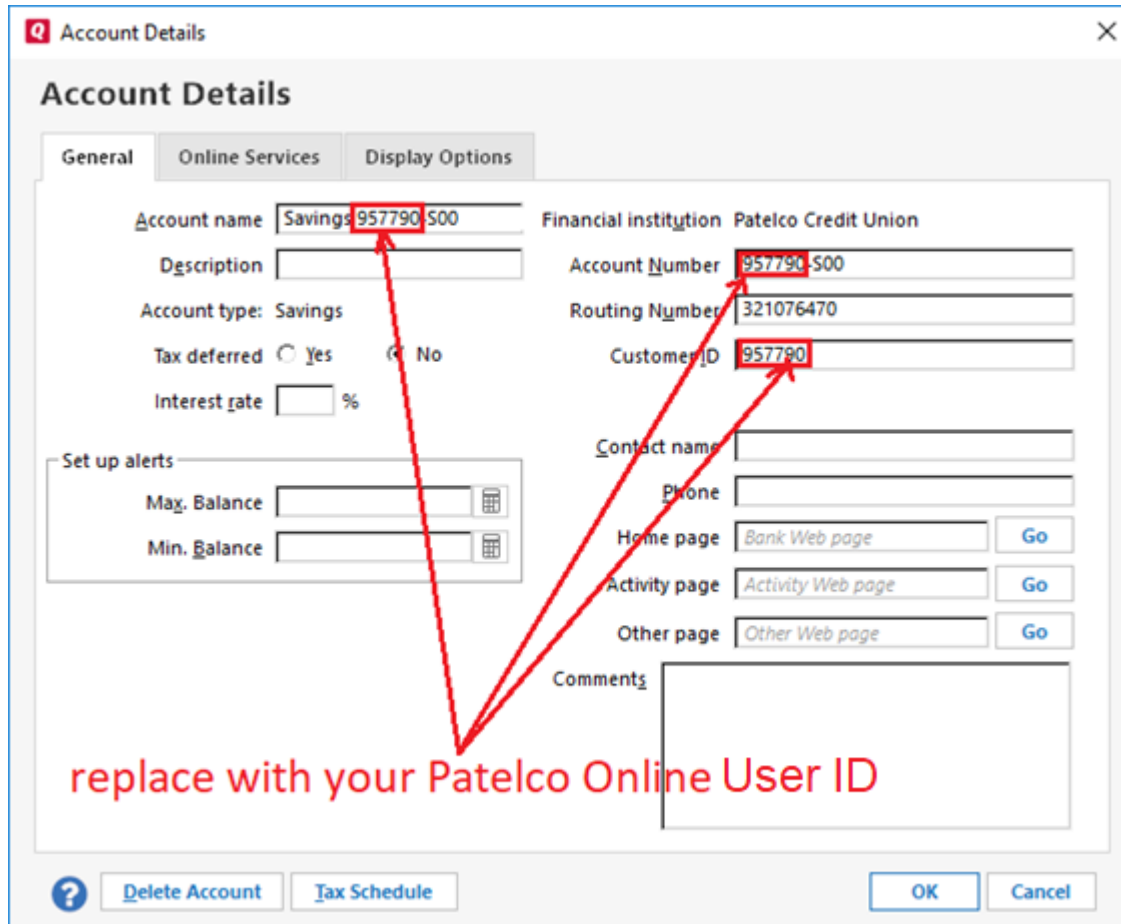




2. Right click on your first Patelco account, and then select **Edit/Delete account**.



3. Replace your existing ID with your **Patelco Online™** User ID. (Remember, your **Patelco Online™** User ID is the username you use to log in to our Mobile App and our online banking at [patelco.org](https://patelco.org).)



**Account Details**

General | Online Services | Display Options

Account name: Savings **957790**.500 | Financial institution: Patelco Credit Union

Description: | Account Number: **957790**.500

Account type: Savings | Routing Number: 321076470

Tax deferred:  Yes  No | Customer ID: **957790**

Interest rate: %

Set up alerts:

Max. Balance: | Contact name: | Phone: |

Min. Balance: | Home page: Bank Web page | Go

Activity page: Activity Web page | Go

Other page: Other Web page | Go

Comments:

**replace with your Patelco Online User ID**

Buttons: Delete Account | Tax Schedule | OK | Cancel



In the **Account name** box, type your User ID between the account type and the suffix. For instance, if your User ID was isuper\*01 and your checking account was suffix 10, you would type:

Checking isuper\*01-S10

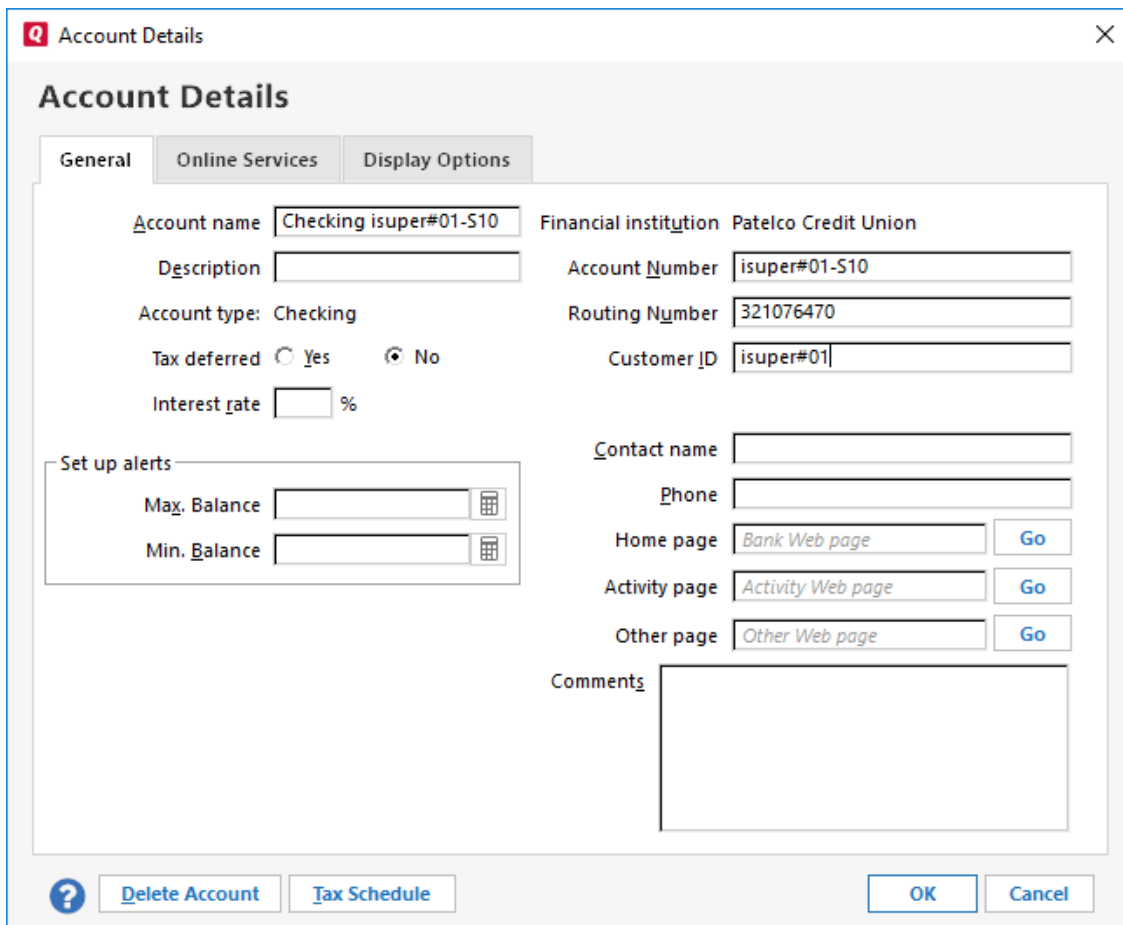
(Make sure to add a **space** after the account type and add **-S** after your User ID. Do not add a space between the **-S** and your suffix number.)

In the **Account Number** box, type your User ID, a dash, and then your suffix. For instance, if your suffix was 10 and your User ID was isuper\*01, you would type:

isuper\*01-S10

In the **Customer ID** field, type your User ID. For instance, if your User ID was isuper\*01, you would type:

isuper\*01



**Account Details**

General | Online Services | Display Options

Account name:  Financial institution: Patelco Credit Union

Description:

Account type: Checking

Tax deferred:  Yes  No

Interest rate:  %

Account Number:

Routing Number:

Customer ID:

Contact name:

Phone:

Home page:

Activity page:

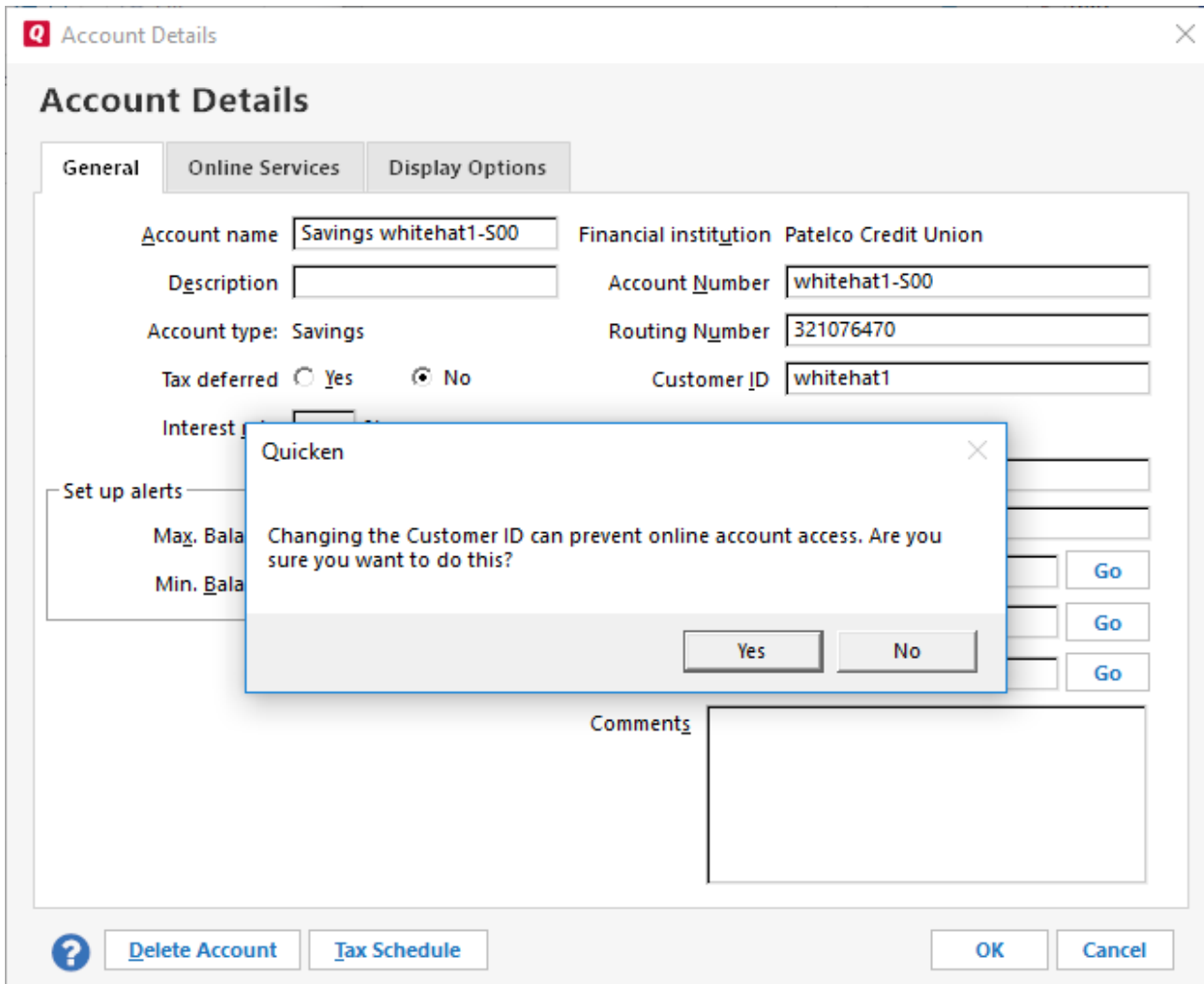
Other page:

Comments:



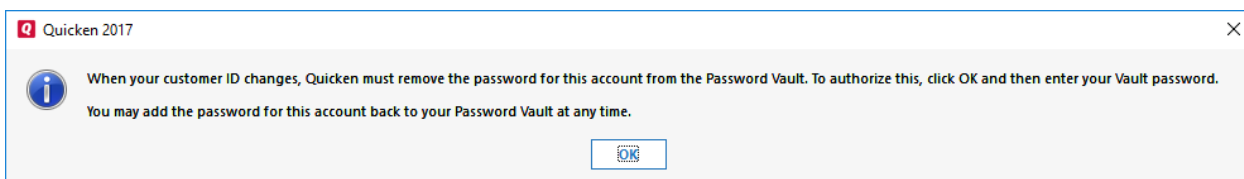
4. Select the **OK** button at the bottom.

5. Select the **Yes** button.



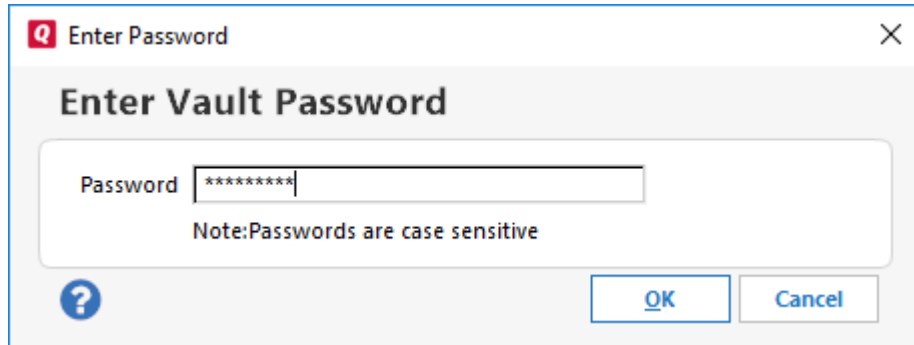
The screenshot shows the 'Account Details' window in Quicken. The 'General' tab is selected, showing fields for Account name (Savings whitehat1-500), Financial institution (Patelco Credit Union), Description, Account Number (whitehat1-500), Account type (Savings), Routing Number (321076470), Tax deferred (No), and Customer ID (whitehat1). A 'Quicken' dialog box is overlaid on the window, asking: 'Changing the Customer ID can prevent online account access. Are you sure you want to do this?' with 'Yes' and 'No' buttons. At the bottom of the window, there are buttons for 'Delete Account', 'Tax Schedule', 'OK', and 'Cancel'.

6. If prompted, select the **OK** button.



The screenshot shows a 'Quicken 2017' information dialog box. It contains the following text: 'When your customer ID changes, Quicken must remove the password for this account from the Password Vault. To authorize this, click OK and then enter your Vault password. You may add the password for this account back to your Password Vault at any time.' There is an 'OK' button at the bottom center of the dialog box.

7. If prompted, enter your Quicken vault password – this is NOT your **Patelco Online™** password. This is your password to your Quicken vault.



8. Repeat the above for each of your Patelco accounts that you manage with Quicken.

9. Close and re-start your Quicken software.

10. Have Quicken update your Patelco transactions as normal. Issues? Contact us at **800.358.8228**.