

## Quicken Windows Direct Connect and Express Web Connect

On the 1st Action Date:

1. Back up your Quicken Windows Data File. Go to **File > Backup and Restore > Backup Quicken File**.
2. Download the latest Quicken Update. Go to **Help > Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

On the 2nd Action Date:

1. Deactivate online banking connection for accounts connected to the financial institution that is requesting this change.
  - a. Choose **Tools > Account List**.
  - b. Click **Edit** on the account to deactivate.
  - c. In Account Details, click **Online Services**.
  - d. Click **Deactivate**. Follow prompts to confirm deactivation.
  - e. Click the **General** tab.
  - f. Delete Financial Institution and Account Number information. Click **OK** to close window.
  - g. Repeat steps for any additional accounts that apply.
2. Reconnect the online banking connection for your accounts.
  - a. Choose **Tools > Account List**.
  - b. Click **Edit** on the account you want to activate.
  - c. In Account Details, click **Online Services** and then choose **Set up Now**.
  - d. Type your institution's name in the search field and click Next.
  - e. Enter your financial institution credentials.
    - Express Web Connect uses the same credentials you use for your institution's online banking login.
    - Direct Connect might require credentials that do not match your online banking credentials.

**Important: If your credentials do not work, contact your financial institution.**

  - f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu.

**Important: Do NOT choose "Create a new account" 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, choose **Ignore – Don't Download into Quicken** or click **Cancel**.
  - g. After all accounts have been matched, click **Next** and then **Done**.

## Quicken Mac Direct Connect and Quicken Connect

On the 1st Action Date:

1. Backup Quicken Mac Data File and Update the application.
  - a. Choose **File > Save a Backup**.
  - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
  - a. Complete last transaction update before the change to get all of your transaction history up to date.
  - b. Accept all new transactions into the appropriate registers.

On the 2nd Action Date:

**Activate the online banking connection for accounts connected to the financial institution that is requesting this change.**

1. Click your account in the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter your financial institution name in the search field, select the correct option and click **Continue**.
5. Enter your financial institution credentials.
  - Express Web Connect uses the same credentials you use for your institution's online banking login.
  - Direct Connect might require credentials that do not match your online banking credentials.

**Important: If your credentials do not work, contact your financial institution.**

6. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under **Action**, choose **Link** to pick your existing account.

**Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.**
7. Click **Finish**.