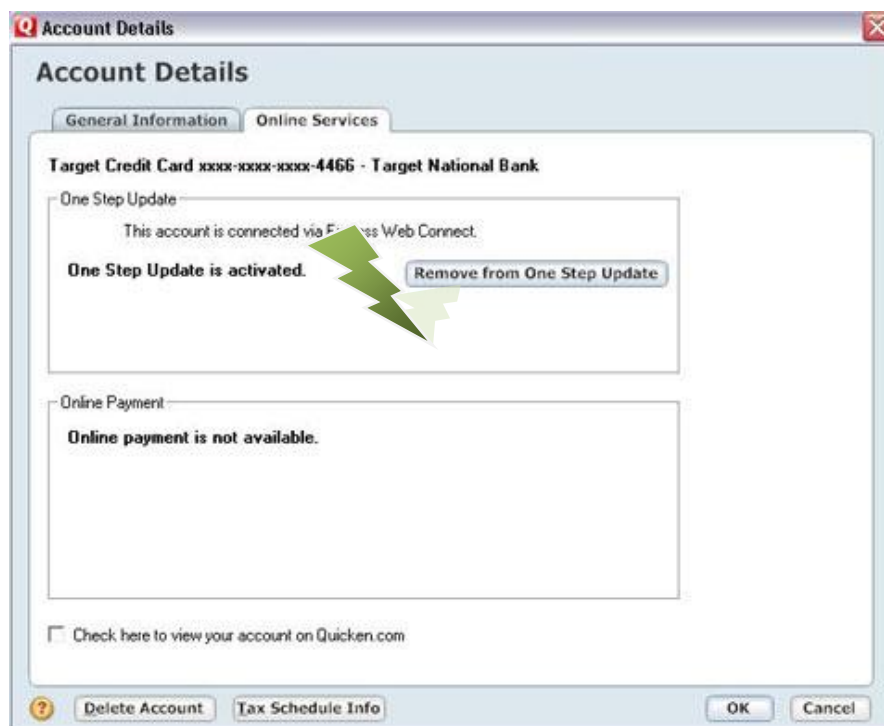


Online Banking Express Web Connect to Direct Connect Conversion Quicken Windows 2008-2010

1. Right click the account in the Quicken Account List
2. Select Edit Account from pop-up.



3. Click the Online Services tab. In the One Step Update section, it will state the connection method the end user is using. Have the Quicken user disable the account by clicking on the "Remove from One Step Update" button.



REFRESH FI LIST

Before you set your accounts up for Direct Connect you will need to refresh the fi list within Quicken, please follow the steps below.

Quicken for Windows 2008 and 2009

- 2008 & 2009 - From the Banking menu, select One Step Update (click Cancel to bypass the Password Vault)
- Remove all the checks from the Financial Institutions and click on Update Now
- Close Quicken → then re-open Quicken

Quicken for Windows 2010

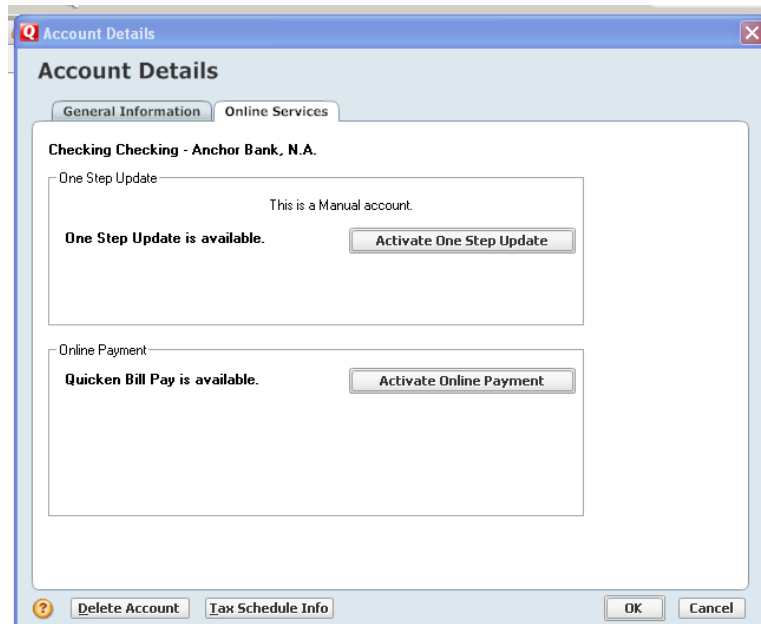
- 2010 - From the Tools menu, select One Step Update (click Cancel to bypass the Password Vault)
- Remove all the checks from the Financial Institutions and click on Update Now
- Close Quicken → then re-open Quicken

ACTIVATE YOUR ACCOUNT(S) FOR DIRECT CONNECT

1. Open Quicken and right click on Quicken Account List. Select EDIT Account from pop-up.
2. In the Financial Institution field, select the correct financial institution name
3. After selection, Click OK



4. Select the Online Services tab and click Active One Step Update



Thank you for making these important changes!