



Quicken Windows Direct Connect and Express Web Connect

On the 1st Action Date: Friday, October 30

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: Monday, November 2

1. Deactivate online banking connection for accounts connected to the financial institution that is requesting this change.
 - a. Choose **Tools > Account List**.
 - a. Click **Edit** on the account to deactivate.
 - b. In Account Details, click **Online Services**.
 - c. Click **Deactivate**. Follow prompts to confirm deactivation.
 - d. Click the **General** tab.
 - e. Delete Financial Institution and Account Number information. Click **OK** to close window.
 - f. 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.
 - i. Express Web Connect uses the same credentials you use for your institution's online banking login.
 - ii. 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**.

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