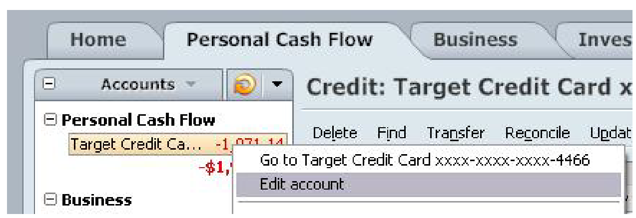
Quicken Direct Connect Set-up Guide

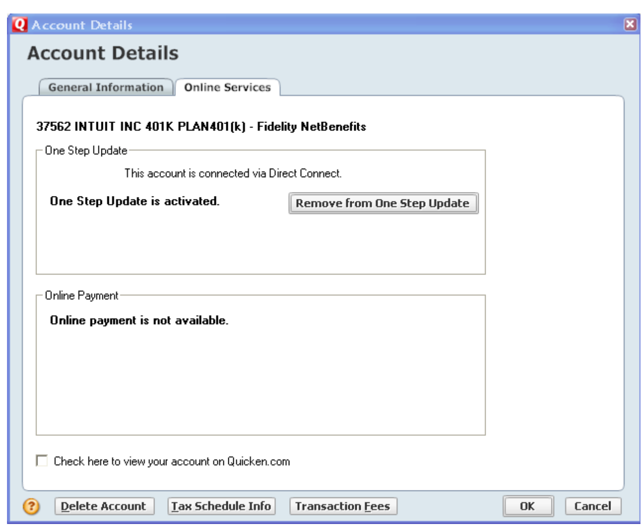
One of the connection methods that EECU supports with Quicken is Direct Connect. The Direct Connect method will allow Quicken to communicate directly with EECU. To establish a Direct Connect method to update transactions and balances for your EECU accounts, a Quicken Direct Connect password will need to be generated for your EECU account. Please contact our Member Service Center at (559)437-7700 or 1-800-538-EECU to obtain this temporary password. Once this has been completed, please follow the steps below to setup your EECU accounts for Direct Connect.

DEACTIVATE YOUR ACCOUNT(S)

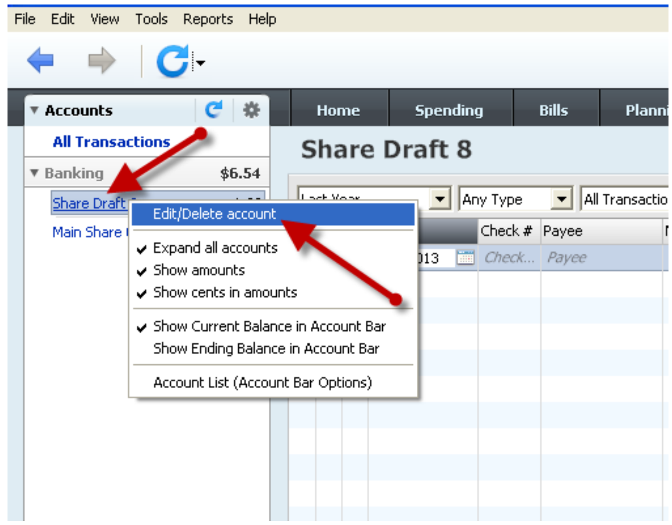
1. **<u>Quicken 2010 & 2011</u>:** Right-click your account from the Quicken Account List and select the ***Edit Account*** option from the pop-up menu.



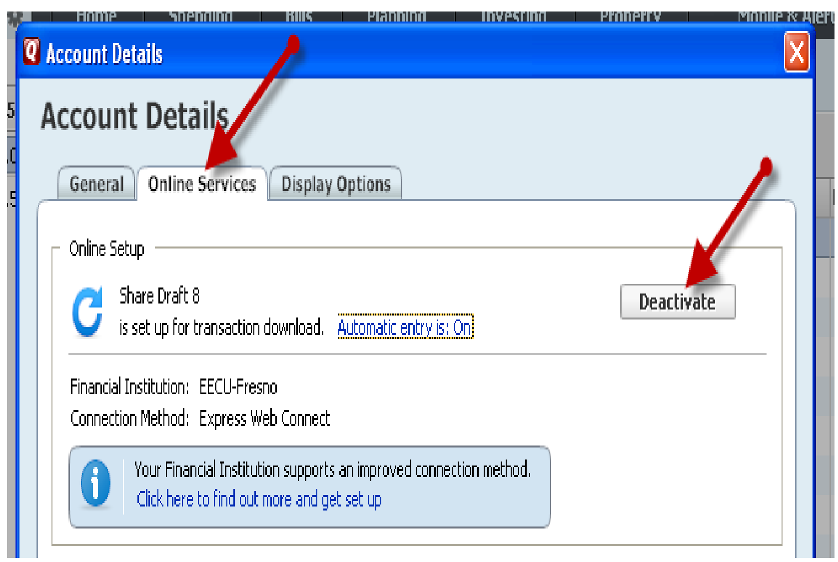
- Click the ***Online Services*** tab. In the ***One Step Update*** section, it will state your current connection method. Deactivate the account by clicking on the ***Remove from One Step Update*** button. Please be aware that this process will need to be completed for all suffixes: Checking, Savings, and any Sub-Savings accounts.



<u>Quicken 2012 & 2013</u>: Right –click on your account from the Quicken Account List and select the ***Edit/Delete Account*** option from the pop-up menu.



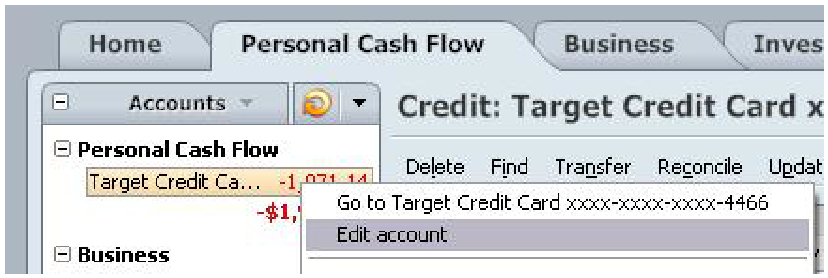
- Select the ***Online Services*** tab and then the ***Deactivate*** button to deactivate your account. Please be aware that this process will need to be completed for all suffixes: Checking, Savings, and any Sub-Savings accounts.



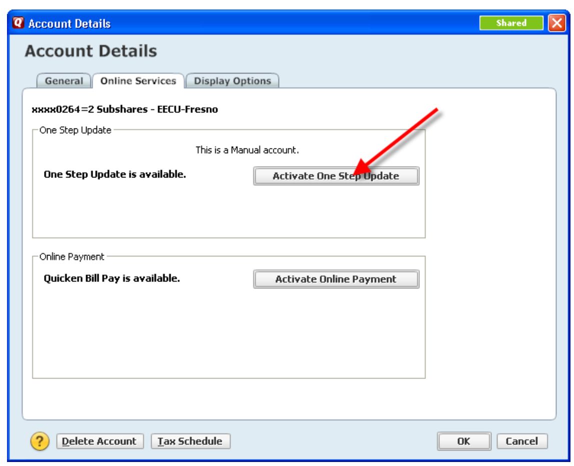
ACTIVATE YOUR ACCOUNT(S)

2. Close Quicken. Re-open Quicken.

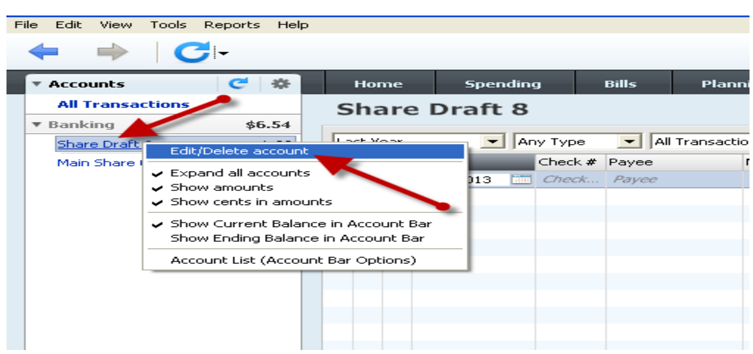
- **<u>Quicken 2010 & 2011</u>:** Right-click on either your EECU Checking or Savings Account from the Quicken Account List and select the ***Edit Account*** option from the pop-up menu.



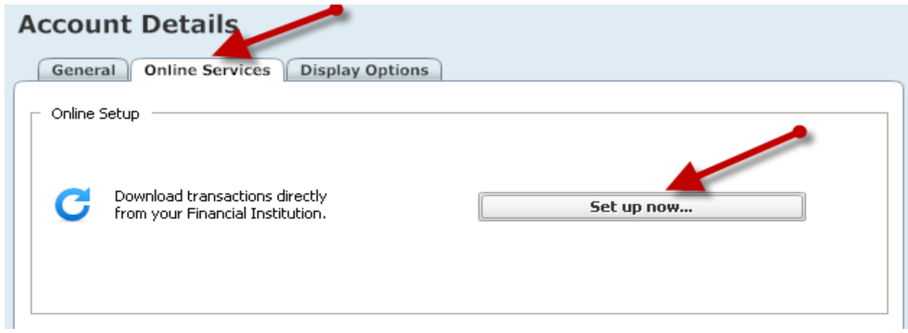
- Click the ***Online Services*** tab. In the ***One Step Update*** section, it will state that the connection method is a Manual account. Click ***Activate One Step Update*** to activate your accounts.



- **<u>Quicken 2012 & 2013</u>:** Right –click on either your EECU Checking or Savings Account from the Quicken Account List and select the ***Edit/Delete Account*** option from the pop-up menu.

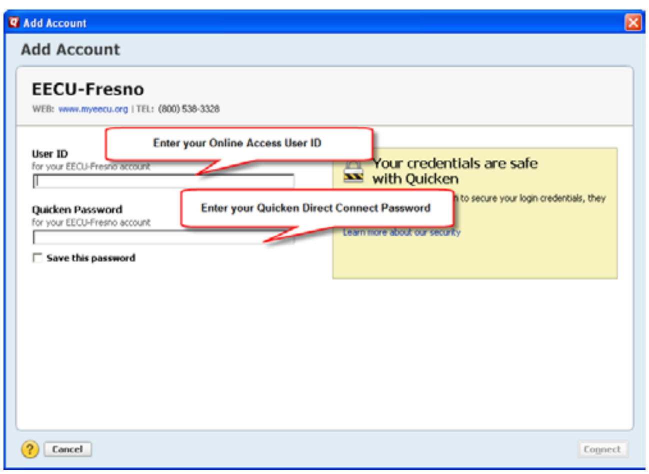


- Click on the ***Online Services*** tab. Under the ***Online Setup*** section, click the ***Set Up Now*** button to activate your accounts.

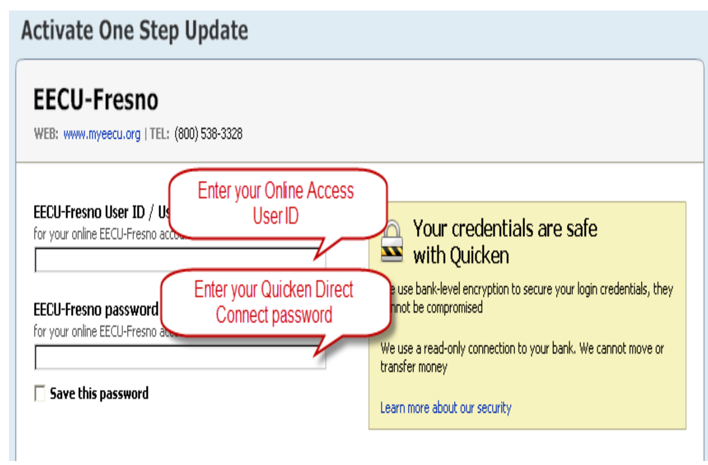


3. Follow the Account Setup to activate your account for online banking. When prompted, enter your Online Access User ID (this is the User ID you use to log on to your account at www.myeecu.org) and the Quicken Direct Connect password you were provided with over the phone.

Quicken 2010 & 2011



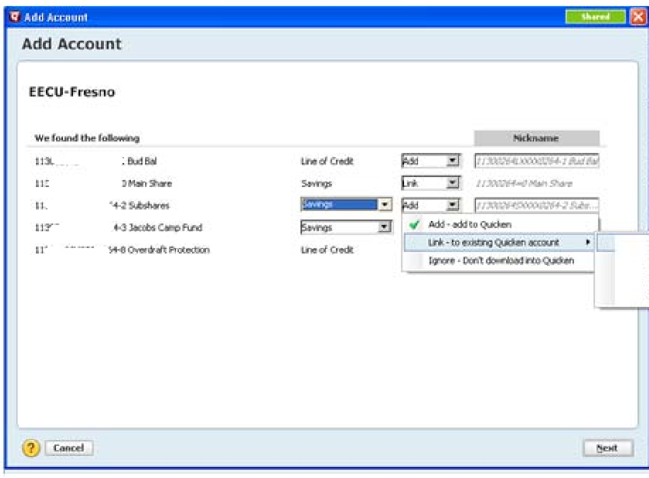
Quicken 2012 & 2013

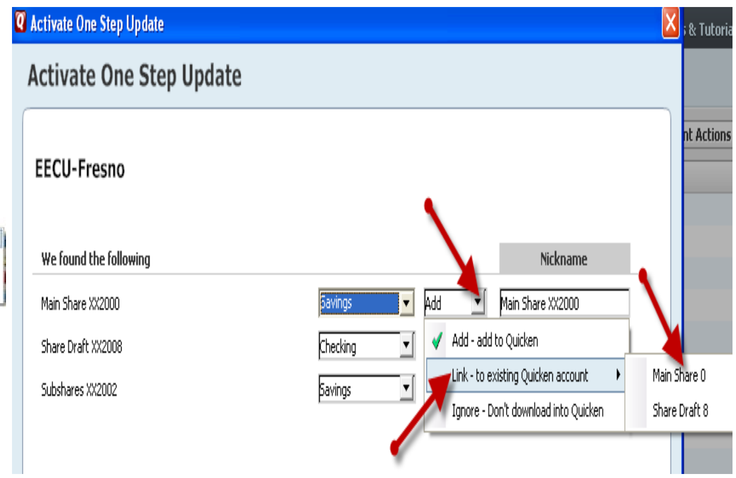


4. Depending on your version of Quicken, select ***Exists in Quicken***, or ***Link – to existing Quicken account*** from the drop-down menu, and select the account name that matches what is shown on screen. Click Next. Repeat these steps for all your suffixes. Your changes will be saved.

Note: Some transactions may be duplicated in your Quicken register as a result of the activation process. Please be sure to review your transactions and delete any duplicates.

Quicken 2010 & 2011 **Quicken 2012 & 2013**





5. Password Reset: Click the ***One Step Update*** icon within Quicken to bring up the ***One Step Update Settings*** window and then click the **KEY** icon.

- The existing password is the password provided to you over the phone.

Note: Please be aware that your new Quicken Direct Connect password will need to be between 6-8 alpha numeric characters. *Special symbols/characters are not allowed*