

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.

General Information Online Serv	vices
562 INTUIT INC 401K PLAN401(k)	- Fidelity NetBenefits
Dne Step Update	
This account is connected	d via Direct Connect.
One Step Update is activated.	Remove from One Step Update
Online payment is not available.	



Quicken 2012 & 2013: 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.
 - Quicken 2010 & 2011: 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.

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L	🗆 Personal Cash Flow	Delate Field Transfer Descende Hadet
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	-\$1, Got	o Target Credit Card xxxx-xxxx-xxxx-4466
	Edit	account ,

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.

🖉 Account Details	Shared 🔀
Account Details	
General Online Services Display Options	
xxxx0264=2 Subshares - EECU-Fresno	
One Step Update This is a Manual account.	
One Step Update is available. Activate One Step Update	
Online Payment	
Quicken Bill Pay is available. Activate Online Payment	
Delete Account Tax Schedule	Cancel

• <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 popup menu.

Fi	e Edit	View	Tools	Reports	Help						
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• Click on the *Online Services* tab. Under the *Online Setup* section, click the *Set Up Now* button to activate your accounts.

Account Details General Online Services Display Options	
Online Setup C Download transactions directly from your Financial Institution.	Set up now

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 <u>www.myeecu.org</u>) and the Quicken Direct Connect password you were provided with over the phone.

Quicken 2010 & 2011

7 ktd bernet	
Add Account	Activate One Step Update
EECU-Fresho WER: www.myeecu.org ITRL: (000) 536-3308 Enter your Online Access User ID For your EECU-Fresho account Packen Password To your EECU-Fresho account Enter your Quicken Direct Connect Password To secure your logn ordentals, they To secure your logn orde	EECU-Fresno User ID / U Enter your Online Access User ID For your online EECU-Fresno acco Enter your Quicken Direct Connect password For your online EECU-Fresno acco We use a read-only connection to your bank. We cannot move or
	Save this password
Cancel Cognet	

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.

Q Activate One Step Update 🔏 ; & Tutori Add Account Activate One Step Update **EECU-Fresno** We found the foll t Actions ; Bud Bal ٠ Line of Gred 113. EECU-Fresno . 115) Main Share Lok. Savinos lavn · Add 173 11. '4-2 Subshares 117 4-3 Jacobs Camp Fund Savings . - add to Qui Link - to existing Quid 4=2 Subshares 11' 54-8 Overdraft Protection Line of Credit %4=3 Subshares We found the following Nickname Ignore - Don't download into Quidi 96-0 Main Share 96=8 Share Draft Main Share XX2000 Add Main Share XX2000 🗹 Add - add to Quicken Share Draft XX2008 Checking Link - to existing Quicken account Main Share O Subshares XX2002 Savings Ignore - Don't download into Quicken Share Draft 8 Next ? Cancel

- 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*

Select quotes Passwords (?)
Select quotes Passwords @
Passwords (?)
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Activate Online Bill Pay
esting.Quicken.com data to update

Quicken 2010 & 2011

Quicken 2012 & 2013