



Quicken for Windows Conversion Instructions

Direct Connect

Introduction

As **Congressional Bank** completes its system conversion to **Business eBanking and Personal eBanking**, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your login credentials for Direct Connect.

NOTE: Direct Connect may require registration. Please contact your financial institution to verify your Direct Connect login information.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!



This detour symbol indicates instructions in a Task specifically for **Bill Pay within Quicken**. If you do **not** use Quicken to make online bill payments, skip that Task.

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. Go to **File > Backup and Restore > Backup Quicken File**.
2. Download the latest Quicken Update. Go to **Help > Check for Updates**

Task 2: Disconnect Accounts in Quicken on or after **8/12/2019**

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you intend to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click on **Deactivate** or **Deactivate Online Payment** (only available if you use bill pay services). Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. Repeat steps for each account you are disconnecting.

Task 3: Reconnect Accounts to **Congressional Bank** on or after **8/12/2019**

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to activate.
3. In the **Account Details** dialog, click the **Online Services** tab.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter **Congressional Bank** in the search field, select the name in the list and click **Next**.
7. If presented with the Select Connection Method screen, select **Direct Connect**.
8. Type your Direct Connect **User ID** and **Password** and click **Connect**.
9. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link** to an existing account and select the matching accounts in the drop-down menu.

10. Do NOT choose **Add to Quicken** unless you want 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**.
11. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
12. Click **Done** or **Finish**.

Task 4: Recreate Online Payments at *Congressional Bank*.



If you are **not** a Bill Pay user within Quicken, your conversion is complete. Skip this Task.

1. Recreate your payments.
2. If you need help creating your payments, choose **Help menu > Quicken Help**.
3. Search for "**Create an online payment**" and click that item.
4. Follow the instructions to enter or transmit an online payment.