Converting from Direct Connect to Web Connect

As part of our digital banking upgrade, the way some customers download account information will temporarily change. **Please take a moment to review the important information below, especially if you download your account information into Quicken®, QuickBooks®, or another financial app.**

What you need to know

• **Direct Connect will not be immediately available** when the new system launches.

• As an interim solution, you'll be able to use **Web Connect**

Now that our Digital Banking Upgrade has finished:

If you currently use Direct Connect

- **Step 1 – Deactivate Direct Connect**
  - You must disable Direct Connect before switching connection types.
  - In Quicken or QuickBooks:
  - Open your financial software.
    - Go to the Account List or Chart of Accounts.
    - Select the account that is currently connected.
    - Open Account Details / Edit Account.
    - Select the Online Services tab.
    - Click Deactivate or Deactivate All Online Services.
    - Save your changes.
    - Repeat these steps for each account previously using Direct Connect.

- **Step 2 – Download Transactions from Online Banking (Web Connect)**
  - Log in to your Online Banking website.
  - Navigate to the account you want to download
  - Locate the Download / Export Transactions option (see below for step-by-step instructions on how to download)
  - Select the file format for your software:
    - **Quicken (QFX)**
    - **QuickBooks (QBO)**
  - Choose the date range of transactions.
  - Click Download and save the file to your computer.
    - Web Connect works by downloading a transaction file and importing it into your software rather than connecting directly to the bank.

- **Step 3 – Import the File into Your Software**
  - **If using Quicken**

- Open Quicken
- Select File → Import → Web Connect (.QFX).
- Locate the downloaded file.
- Choose Link to existing account.
- Accept the imported transactions.

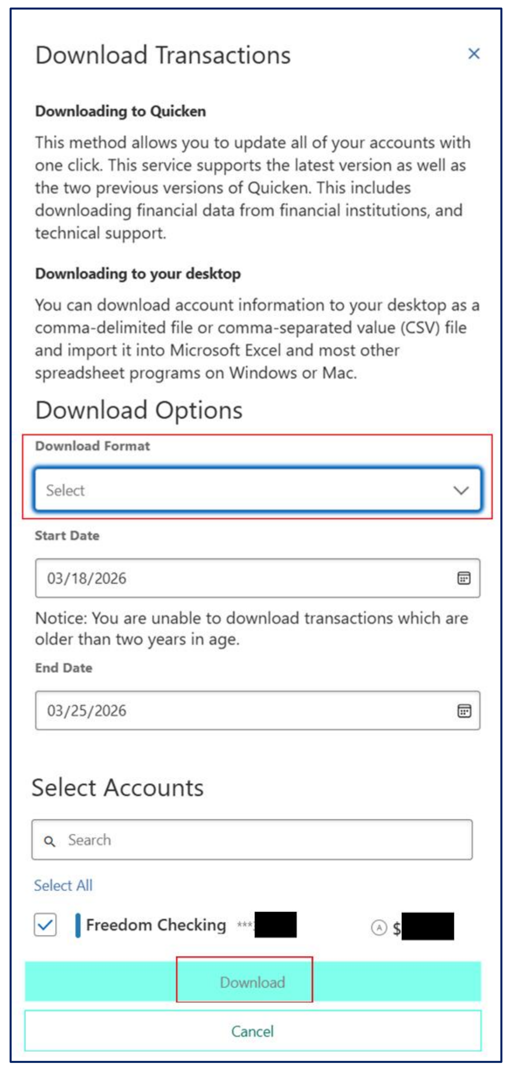
- **If using QuickBooks**
  - Open QuickBooks
  - Select Banking → Bank Feeds → Import Web Connect File.
  - Select the downloaded .QBO file.
  - Link the file to the correct account.
  - Review and add transactions.

Important Tips

- Download transactions **starting after** your last Direct Connect update.
- Web Connect **must be performed each time** you want to update transactions.
- When importing the file, **always select Link to Existing Account**. ***Creating a new account may cause duplicate accounts or transactions.***

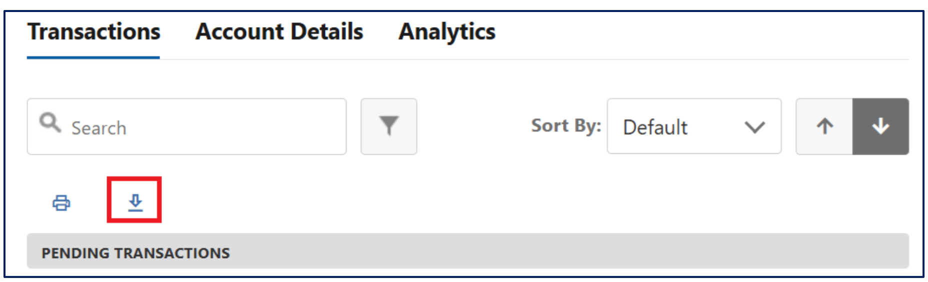
Going Forward

To update your transactions, simply download a new file from Personal Online Banking and import it into Quicken or QuickBooks whenever you need to update your records.



How to download transactions from our new Online Banking platform

- Once logged in to online banking
- Choose and view an account
- Select the downward arrow



- On the slide out, choose your date range, accounts you want transactions from, and format you'd like to download