Quicken for Windows Conversion Instructions

Quicken for Windows 2013–2016

Web Connect to Direct Connect

Introduction

As your bank completes its system upgrade*,* 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 User ID and Password for the eBanking website.

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

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

Documentation and Procedures

Task 1:   Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for *Backing Up Your Data* and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for *Update Software* and follow the instructions.

Task 2:   Deactivate Your Account(s) At *County National Bank-Erie Bank BIB* on or after *May 23, 2016*

1. Choose **Tools** menu > **Account List**.

2. Click the **Edit** button of the account you want to deactivate.

3. In the **Account Details** dialog, click on the **Online Services** tab.

4. Click **Deactivate**. 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 wish to deactivate.

Task 3:   Re-activate Your Account(s) at *CNB Bank/ERIEBANK/FCBank* on or after *May 23, 2016*

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 on the **Online Services tab**.

4. Click **Set up Now**.

5. Use **Advanced Setup** to activate your account.

6. Enter *CNB Bank/ERIEBANK/FCBank* 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.

IMPORTANT:	Do **NOT** select **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, select **Ignore – Don't Download into Quicken**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.

11. Click **Done** or **Finish**.

Thank you for making these important changes!

Quicken for Mac
Conversion Instructions

Quicken for Mac 2007

Web Connect to Direct Connect

Introduction

As your bank completes its system upgrade*,* 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 User ID and Password for the eBanking website.

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

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

Documentation and Procedures

Task 1:   Conversion Preparation
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12. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for *Backing Up*, select **Backing Up Your Data**, and follow the instructions.

13. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for *Updates*, select *Check for Updates*, and follow the instructions.

Task 2:   Deactivate Your Account(s) At *County National Bank-Erie Bank BIB* on or after *May 23, 2016*
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14. Choose **Lists** menu > **Accounts**.

15. Select the account to deactivate and click **Edit**.

16. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.

17. Remove the information within the **Account Number** and **Routing Number** fields.

18. Click **OK** to save your edits.

19. Repeat steps 2 – 5 for each account at *County National Bank-Erie Bank BIB*.

20. Verify your account list does not display a blue online circle icon for the accounts you are deactivating.

Task 3: Re-activate Your Account(s) at *CNB Bank/ERIEBANK/FCBank* on or after *May 23, 2016*

21. Choose **Lists** menu > **Accounts**.

22. Select your first disabled account and click **Edit**.

23. Click the **Financial Institution** drop-down list and select **Change Financial Institution**.

24. Click on **Update List**.

25. In the **Financial Institutions** dialog, select *CNB Bank/ERIEBANK/FCBank* from the list and click **Use**.

26. Enter your Direct Connect **User ID** and **Password**. Click **OK**.

27. In the **Add Online Services** dialog, match your first account to the appropriate account number. Click **OK**.

> **NOTE:** Each account will be displayed below "**Use an existing account**."

28. Click **OK**.

29. Click OK to close the **Edit Register** page.

30. Choose **Lists** menu > **Accounts**. Verify that each account you are reactivating has a blue online circle for online services.

Thank you for making these important changes!