

# Converting or Setting Up Quicken to Direct Connect Instructions

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## Introduction

If you are connected to Quicken with Web Connect you will need to deactivate your online banking services for each account connected to **Univest Bank and Trust Co.** After the account(s) have been deactivated, you will need to setup online services.

## Documents and Procedures

### Task 1: Download Transactions Before Deactivating Online Services

1. Open **Account Register**
2. Select **Downloaded Transaction** tab (if there are no transactions listed, skip to step 6)
3. Accept all transactions
4. Deactivate your online banking services for your Quicken Account
5. Repeat steps 1-4 for each account at **Univest Bank and Trust Co.**
6. Select **Tools** Menu > **Online Center**
7. Choose the appropriate financial institution and account
8. Select **Transactions**
  - a. If transactions listed, click **Compare to Register** and accept transactions
  - b. If not transactions listed or **Compare to Register** does not allow you to accept transactions, please call the Univest at 877.723.5571 or refer to the Intuit support site

**NOTE:** Quicken will not deactivate online services if you have not accepted all downloaded transactions. Verify that you have accepted all transactions.

### Task 2: Deactivate Online Banking Services for your Quicken Account

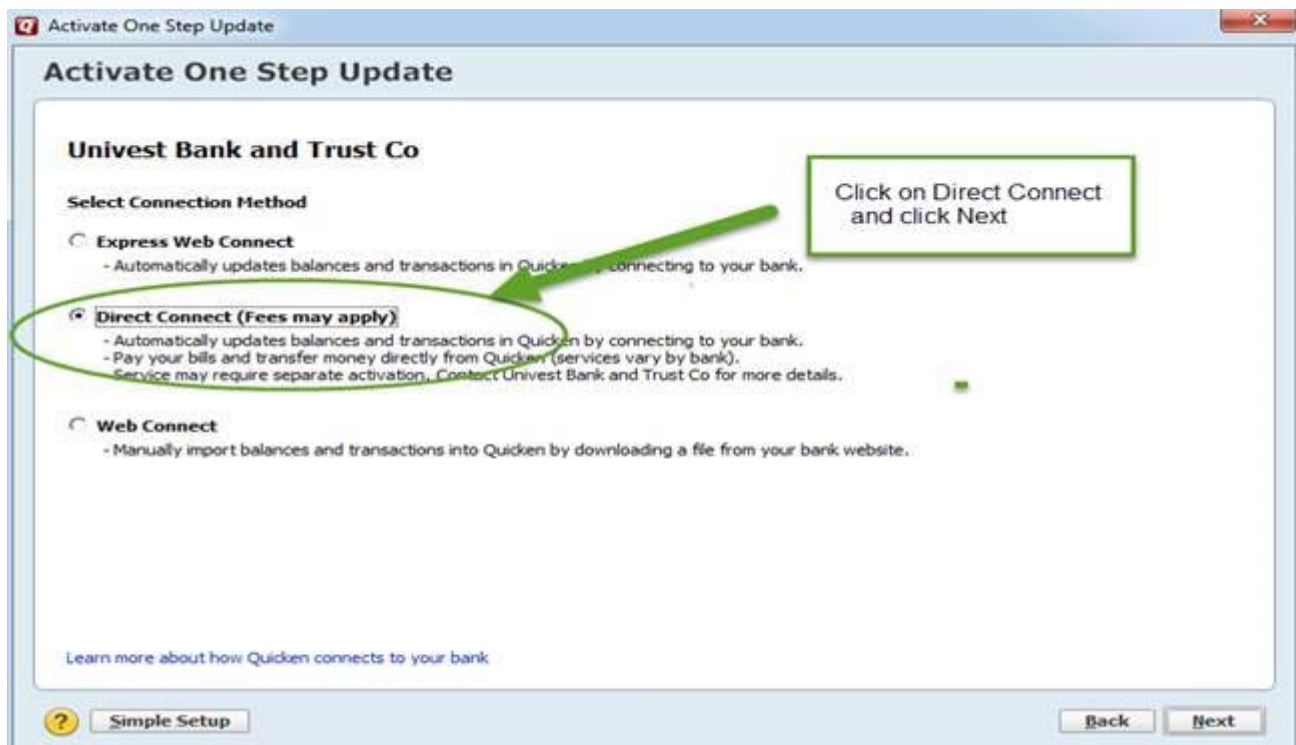
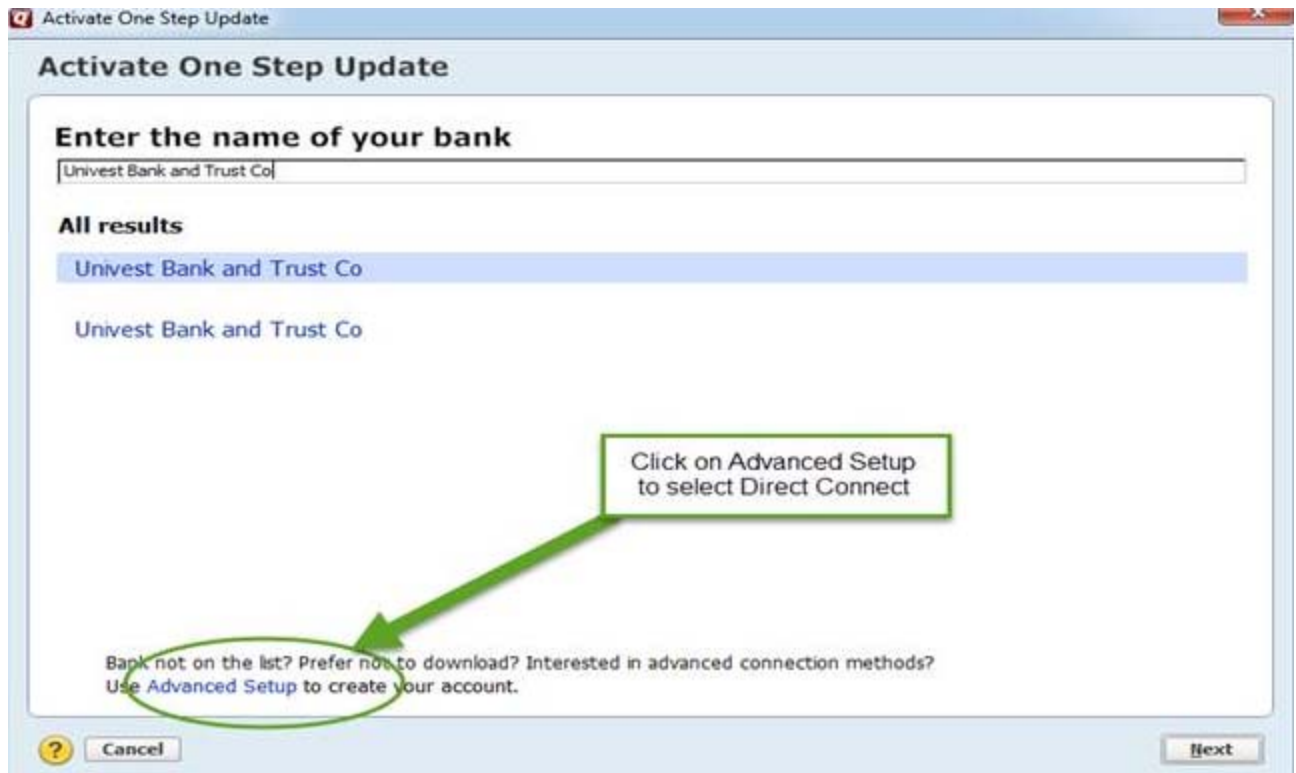
1. Choose **Tools** menu > **Account List**
2. Select your account under the **Accounts List** and click **Edit**
3. Click the **Online Services** tab
4. Click **Deactivate** for the service you want to disable
5. Click **Yes** to disable this service (You will not receive this message if you did not download your transactions prior to deactivating your online services)
6. Click on the **General** tab
7. Delete the financial institution name and account number
8. Click OK
9. Repeat steps 1-8 for each account at **Univest Bank and Trust Co.**

**NOTE:** If you have an investment account that is linked to a cash account, you need to deactivate the online services from the investment account. When the online services are deactivated for the investment account, online services for the linked cash account are also deactivated.

### Task 3: Re-activate Online Banking Services to Direct Connect

1. Choose **Tools** Menu > **Account List**
2. Select **Edit Account** to activate account
3. Choose **Online Services** tab
4. Click **Setup Now**
5. Type **Univest Bank and Trust Co.** > **Advanced Setup**
6. Select **Direct Connect** > **Next**
7. Enter credentials, select **Save** this password (if using password vault)
8. Click **Connect**

**NOTE:** After you click Connect you should see a list of account(s) to activate. If you are activating an existing account(s), make sure the drop down for your account(s) says Link. If account(s) dropdown says Add, change to Link and select correct account(s). If you do not see a dropdown with Add/Link the account(s) will be added as a different account(s) instead of being linked to an existing account.



## Frequently Asked Questions

### Q. What must you know about your first update?

- A. The update may take more time than subsequent sessions because your entire available transaction history is being updated (usually 90 days' worth of transactions).

The first time you use Quicken's online banking or Investment-Tracking services, we recommend that you update only your latest transactions. This allows you to update your register or transaction list before starting other online account activities. Updating asset classes or getting quotes are just a few examples.

### Q. How is the first update different for investment accounts?

- A. When updating transactions for an investment account, you may be asked to perform some additional steps such as matching securities or resolving placeholder entries. In addition the value of your holdings in Quicken may vary from the value reported by your financial institution due to differences in rounding rules and similar factors.

### Q. What currencies are supported?

- A. Online account services are available only for U.S. dollar accounts; if an account is based on another currency, you will not be able to activate that account.

### Creating a New Quicken Account for Online Access

1. Choose **Tools** Menu > **Add Account**
2. Type **Univest Bank and Trust Co.** and click **Next**
3. Enter credentials, select **Save** this password (if using password vault)
4. Click **Connect**
5. Select the account type(s) for discovered accounts
6. Click **Next**
7. Repeat steps 1-6 for each account at **Univest Bank and Trust Co.**