

Quicken Direct Connect Conversion Guide

As we complete our technology conversion, you will need to modify your Quicken settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for both Windows and Mac.

Quicken Windows Direct Connect

On Friday, June 11 prior to 6:00 p.m. CT:

1. Back up your Quicken Windows Data File. Go to **File > Backup and Restore > Backup Quicken File**.
2. Download the latest Quicken Update. Go to **Help > Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

On Monday, June 14 after 8:00 a.m. CT:

1. **Deactivate online banking connection for accounts connected to INTRUST Bank.**
 1. Choose **Tools > Account List**.
 2. Click **Edit** on the account to deactivate.
 3. In Account Details, click **Online Services**.
 4. Click **Deactivate**. Follow prompts to confirm deactivation.
 5. Click the **General** tab.
 6. Delete Financial Institution and Account Number information. Click **OK** to close window.
 7. Repeat steps for any additional accounts that apply.
2. **Reconnect the online banking connection for your accounts.**
 1. Before proceeding with the following steps, be sure you have logged in to INTRUST Personal Online or Mobile Banking directly through intrustbank.com or the INTRUST Bank app and created a new password. Visit intrustbank.com/conversion for more details.
 2. Choose **Tools > Account List**.
 3. Click **Edit** on the account you want to activate.
 4. In Account Details, click **Online Services** and then choose **Set up Now**.
 5. Type *INTRUST Bank* in the search field and click **Next**.
 6. Enter your INTRUST Personal Online Banking credentials.
 - Note: The Quicken Direct Connect credentials you used prior to the conversion will not work.
 7. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu.
 - **Important: Do NOT choose “Create a new account” unless you intend 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** or click **Cancel**.
 8. After all accounts have been matched, click **Next** and then **Done**.



Quicken Mac Direct Connect

On Friday, June 11 prior to 6:00 p.m. CT:

1. Backup Quicken Mac Data File and Update the application.
 - a. Choose **File > Save a Backup**.
 - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete a final transaction update to get all of your transaction history up-to-date.
 - b. Accept all new transactions into the appropriate registers.

On Monday, June 14 after 8:00 a.m. CT:

Activate the online banking connection for your INTRUST Bank account(s).

1. Before proceeding with the following steps, be sure you have logged in to INTRUST Personal Online or Mobile Banking directly through intrustbank.com or the INTRUST Bank app and created a new password. Visit intrustbank.com/conversion for more details.
2. Click your account in the Accounts list on the left side.
3. Choose **Accounts > Settings**.
4. Select **Set up transaction download**.
5. Enter *INTRUST Bank* in the search field, select the correct option and click **Continue**.
6. Enter your INTRUST Personal Online Banking credentials.
 - Note: The Quicken Direct Connect credentials you used prior to the conversion will not work.
7. In the Accounts Found screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under **Action**, choose **Link** to pick your existing account.

Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.
8. Click **Finish**.

Quicken Windows Bill Pay

Only complete these tasks if you currently initiate Bill Payments from within Quicken Windows.

Important: These tasks must be completed to avoid possible duplicate payments. If you do not cancel payments scheduled to be paid on or after Friday, June 11, these payments may still be processed.

On or Before Friday, June 11 at 6:00 p.m. CT:

Cancel Existing Bill Payments.

1. Choose **Tools > Online Center**.
2. Choose INTRUST Bank from the Financial Institution drop-down list.



3. On the Payments tab, choose an account from which a payment is scheduled in the future.
4. In the payments status list, you will cancel payments for each payee with a status that is scheduled for delivery on a date after Friday, June 11. To do this, select the first payee and click **Cancel Payment**.
5. Repeat steps 3 and 4 for all payments that are scheduled for delivery after Friday, June 11.
6. On the toolbar, click **Repeating**.
7. Choose a payment instruction and click **Delete**. Click **Delete** again in the confirmation window.
8. Repeat step 7 for each repeating payment you have with INTRUST Bank.

On or After Monday, June 14 at 8:00 a.m. CT:

Re-create Your Bill Payments.

If you need help re-creating payments, choose **Help > Quicken Help**. Search for **Create an online Payment** and follow the instructions to create and transmit an online payment.

Quicken Mac Bill Pay

Only complete these tasks if you currently initiate Direct Connect Bill Payments from within Quicken Mac.

Important: These tasks must be completed to avoid possible duplicate payments. If you do not cancel payments scheduled to be paid on or after Friday, June 11, these payments may still be processed.

On or Before Friday, June 11 at 6:00 p.m. CT:

Cancel Existing Bill Payments.

1. Highlight a Bill Payment transaction on the account register.
2. While on the account register, choose **File > Print** to save your list of pending payments. You can use this when you re-create the bill payments and send these payments again.
3. Click **Edit** at the bottom of the account register window.
4. Click **Edit Details** below the highlighted transaction.
5. Click the Online Payment tab and choose **Cancel Payment**.
6. Repeat these steps for each outstanding Bill Payment you have scheduled with INTRUST Bank.

On or After Monday, June 14 at 8:00 a.m. CT:

Re-create Your Bill Payments.

For assistance with re-creating payments, choose **Help** and search for **Adding online Bill Pay transactions**. Follow the instructions to create and transmit an online payment.