



## Quicken Express Web Connect Instructions

### Windows Instructions

To Disconnect from First National Bank Waterloo

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 to be disconnected.

To Reconnect to FNB Waterloo

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 FNB Waterloo in the search field, select the name in the list and click Next
7. If presented with the Select Connection Method screen, select Express Web Connect
8. Enter your User ID and Password - 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. After all accounts have been matched, click Next. You will receive confirmation that you accounts have been added
11. Click Done or Finished

### MAC Instructions

To Disconnect from First National Bank Waterloo

1. Select your account under the Accounts list on the left side
2. Choose Accounts menu > Settings
3. Select Troubleshooting > Deactivate Downloads
4. Repeat steps for each account to be disconnected

To Reconnect to FNB Waterloo

1. Select your account under the Accounts list on the left side

2. Choose Accounts menu > Settings
3. Select Set Up Transaction Download
4. Enter FNB Waterloo in the Search field, select the name in the Results list and click Continue
5. Enter your User ID and Password and click Continue
6. If the bank requires extra information, enter it to continue
7. In the Accounts Found screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, select Link to pick your existing account
8. Select Finish