Quicken Web Connect Instructions

Windows

To Disconnect from First National Bank Waterloo

1. Choose Tools menu > Account List
2. Click the Edit button on 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 institutions 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. Download your Quicken Web Connect file from https://www.fnbwaterloo.com
2. Click File > File Import > Web Connect File. Locate and select the Web Connect file to import.
3. Import Downloaded Transactions window opens: Select Link to an existing account and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
4. Repeat steps for each account to be reconnected.

Quicken for MAC 2007

To Disconnect from First National Bank Waterloo

1. Choose Lists menu > Accounts
2. Select the account to deactivate and click Edit
3. In the Download Transactions drop-down list, select Not Enabled. Follow the prompts to confirm the deactivation.
4. Remove the information within the Account Number and Routing Number fields.
5. Click OK to save your edits.
6. Repeat steps 2-5 for each account to be disconnected.
7. Verify your account list does not display a blue online circle icon for the accounts you are disconnecting.

To Reconnect FNB Waterloo

1. Download your Quicken Web Connect file from https://www.fnbwaterloo.com
2. Import your transactions to Quicken

3. Associated the account to the appropriate account already listed in Quicken. Select Use an existing account.
4. Match the transactions you are importing to the corresponding existing Quicken account in the drop-down list and click OK
5. Repeat steps for each account to be reconnected
6. Choose Lists menu > Accounts. Verify each account at FNB Waterloo has a blue online circle indicating it has been reactivated for online services.

Quicken for MAC 2015-2017
To Connect 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. Log in to https://www.fnbwaterloo.com . Download a file of your transactions to your computer.
6. Drag and drop the downloaded file into the Drop Download File.
7. In the Account 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. Click Finish
9. Repeat steps for each account to be connected