USING QUICKEN™ DIRECT CONNECT & WEB CONNECT

Quicken™ uses three ways to download from and interact with your bank:

- **Web Connect** is, simply put, a way you can download your transactions directly from your bank's website and import them into Quicken™.
- With the **Direct Connect and Express Web Connect/Quicken™ Connect** methods, Quicken™ communicates directly with WestStar on your behalf. You do not need to sign in to online banking and manually download transactions - Quicken™ does this for you.

How do I add a Direct Connect account?

Quicken™ has several videos to help you set up your account:

- Direct Connect (for Windows)
- Direct Connect (for Mac)

I currently have an account. How do I know what method I am using?

- Choose the **Tools** menu in the upper left then select **Account List**. Click **Edit** next to your account, then choose the **Online Services** tab at the top.
- On a **Mac**, choose your account on the left, then click **Settings** on the bottom right.

How do I change the connection method on an account?

For Windows:

1. Within Quicken™, click on **Tools** > **Account List.**
2. Click on **Edit.**
3. On the **Account Details** dialog box, go to the *Online Services* tab.
4. Click on **Change connection method** if the option is there. If not, click **Deactivate** instead.
5. Once the account has been deactivated, click on **Set up now.**
6. Select the connection method and click **Next.**
7. Enter your credentials and click **Connect.**
8. When Quicken™ has returned all accounts discovered for WestStar, carefully **LINK** each of the found accounts to the appropriate accounts you already have set up in Quicken™.
9. Click **Next**, then **Finish.**

For Mac:

1. Within Quicken™, click on the account name for your account(s) in the Account toolbar.
2. Click the **Settings** icon in the bottom right corner of the screen.
3. Select the **Downloads tab.**
4. Click on **Change Connection Type**.
5. To see the connection methods available, click **Options.**
6. Continue with the setup.

Deposit and loan products are offered through WestStar Bank, Member FDIC.

I received a Quicken message for Error CC-800. What do I need to do?

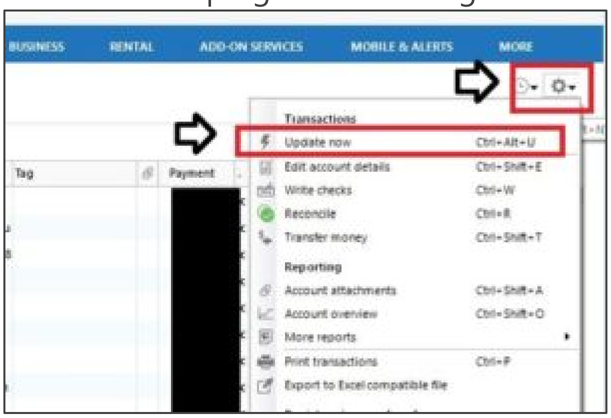
A Quicken Error CC-800 is one of the most common problems and can arise due to multiple reasons.

◆ Task 1: Ensure Quicken Version is the Latest

1. In **Quicken**, go to **Help** > **Check for Updates**.
2. If an update is available, follow the on-screen instructions to download it. If Quicken is already running with the latest release, proceed with Task 2.

◆ Task 2: Refresh Your Online Account Information

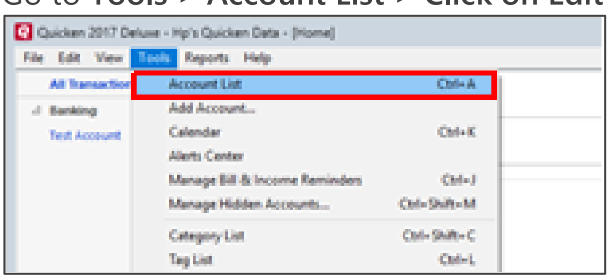
1. Open Quicken register.
2. Go to the account with the error from the account bar.
3. Click on the top right-hand side gear icon and select **Update Now** (Ctrl+Alt+U).



4. Enter the requested information (your bank account, username, and password).
5. Click **Update Now**.

◆ Task 3: Deactivate the Account

1. Go to **Tools** > **Account List** > **Click on Edit** (for the account with the error).



2. On the **Online Services** tab, click **Deactivate**.
3. Click **Yes** to confirm, then **OK**.

◆ Task 4: Verify Quicken Files

1. Go to **File** > **File Operations** > **Validate and Repair**.

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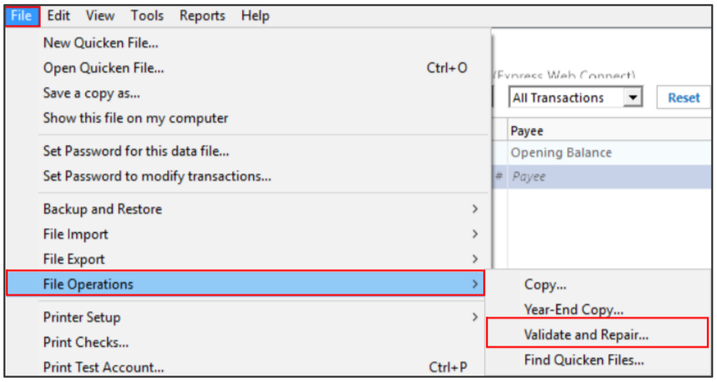
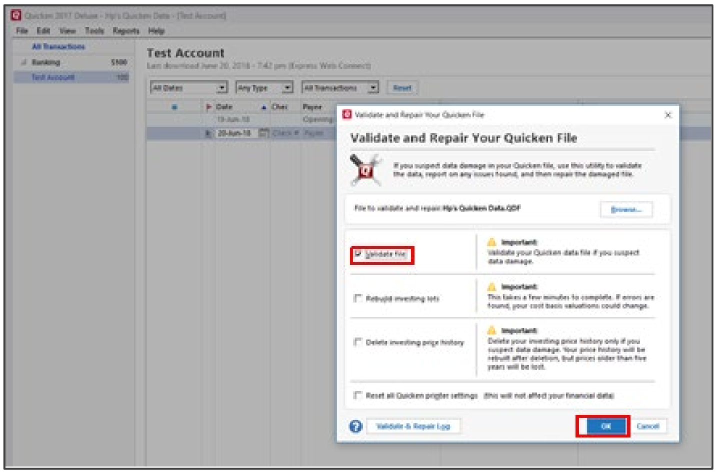


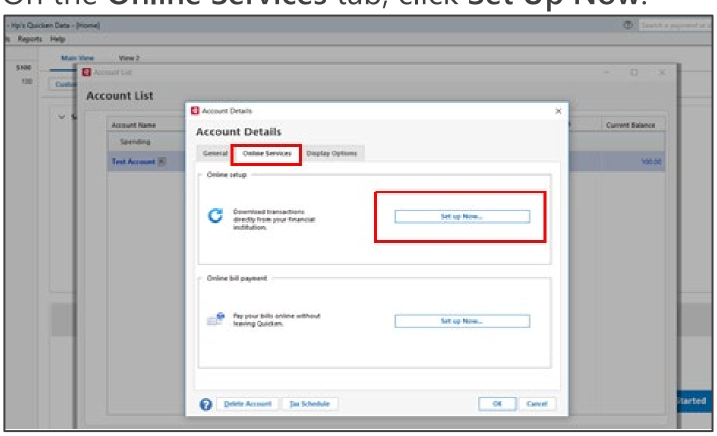
2. Check **Validate File**.
3. Click **OK**.



4. Quicken will validate the file (It may take some time depending on your file size).
5. Once validation has completed, check the **DATA_LOG** for any errors.

◆ Task 5: Reactivate the Account

1. Go to **Tools** > **Account List** and click on **Edit** (for the account with the error).
2. On the **Online Services** tab, click **Set Up Now**.



3. In the next window, enter your bank information – then click Continue.
4. Check **Save This Password** (It may ask to put the vault password or Quicken ID/ password).
5. Click **Connect**.

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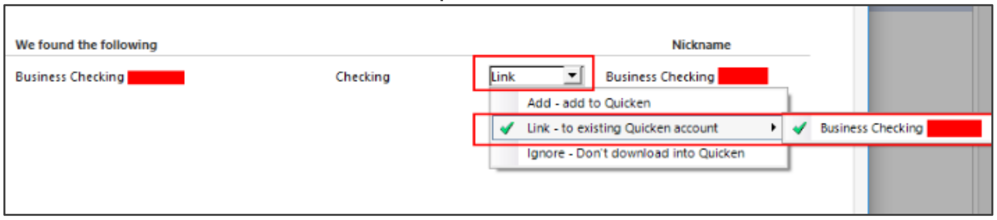
6. Select **Link** from the dropdown menu.



7. Click **Next** and **Finish**.

How do I connect my account with Web Connect?

To activate a Web Connect account:

1. On the WestStar online banking website website, click the option to download your account information as a Web Connect (QFX) file. If prompted, click **Open**.
2. If this is the first time you have downloaded information for this account, or if Quicken™ cannot determine which account to download the transactions into, you are prompted to identify the Quicken™ account you use to track this financial information.
   - If you have set up an existing Quicken™ account for this account, click **Account already exists**, then choose the account nickname from the drop-down menu.
   - If you have not yet set up a Quicken™ account for this account, click **Create a new Quicken™ account**, and then click **Continue**.
3. After clicking **Continue**, your recent account history is downloaded from WestStar to Quicken™. Depending on the amount of information being sent, you may see a progress bar indicating how much of the transfer is complete.
4. When your recent account history has been transferred, accept the downloaded transactions into Quicken™.
5. After the initial download and processing, you can download the Web Connect file from the Online Center window by clicking **Update/Send**.

Note: With Web Connect, you cannot send email, make online transfers, or make payments through Quicken™. However, these functions are available through Direct Connect.

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