

**Independent Financial** is excited to offer Direct Connect. If you would like to enhance your Intuit connection, you will need to modify your Quicken settings to ensure the smooth transition of your data. It is important that you perform the following instructions exactly as described and in the order presented.

## Documentation and Procedures

### Task 1: Pre-set up

After you sign into your Quicken account you must disable your account(s) from any online connection prior to using Direct Connect:

1. Select the **Tools** menu and select **Account List**. The Account List window opens. (You can also access this from the **Setup tab > Accounts**.)
2. Select the account for which you want to deactivate online services, and then click **Edit Details** at the top of the window. The Account Details window opens.
3. Click the **Online Services** tab.
4. Click **Remove** from One Step Update next to the service you want to disable.
5. Click **Yes** to the message asking if you want to disable this service.
6. Click **OK** to the confirmation message. The Account Details window is refreshed, and the service is listed as Available.

### Task 2: Set up Direct Connect

Once the pre-set up steps above are done you can download transaction information to Quicken using your Independent Financial Online Banking credentials.

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 on the **Online Services** tab.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter **Independent Bank** and click **Next**.
7. If presented with the Select Connection Method screen, select **Direct Connect**.
8. Type your Independent Financial Online Banking **ID** and **Password** and 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.

**IMPORTANT:** Do **NOT** select **Add to Quicken** unless you want to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

1. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
2. Click **Done** or **Finish**.