Genesee Regional Bank

Quicken® Direct Connect Enrollment Instructions for New Customers

Introduction

Use these instructions if you are connecting Quicken and a new GRBonline account for the first time.

Documentation and Procedures

1. Login to Quicken
2. At the top, click **Add Account**
3. Select the account type
4. Search for **Genesee Regional Bank**
5. Enter your **GRBonline ID** and **GRBonline Password**
6. Click **Connect**
7. In the drop down, choose to **Link** or **Add new account** to Quicken as appropriate.
8. Click **Next**
9. You will receive confirmation that the Account(s) were added.
10. Check Sync to Quicken Cloud for Mobile & Alerts if applicable.
11. Click **Finish**.
12. To verify your accounts have been linked to Direct Connect, go to **Tools**>**Account List**. The Transaction download column will display Yes (Direct Connect).
13. You can also verify that the account(s) are setup for initiating bill payments* by going to **Tools**>**Account List**. Click **Edit** next to the account.
14. Click **Online Services**. Verify that Online setup and online bill payment are activated. If they are not activated, click **Setup Now**. Choose **Option 2 Genesee Regional Bank** payment service and click **Activate Now**.
15. Once connected, all banking functions can be completed by going to **Tools**>**Online Center**. From there you can download transactions or create new bill payments* or transfers for each account setup with Direct Connect.

**You must be enrolled in bill pay on GRBonline to use this feature.*

Additional Information:

You must be using one of the three latest versions of Quicken to use Direct Connect.