Quicken® for Windows Conversion Instructions
Express Web Connect or Web Connect to Direct Connect

Introduction

Genesee Regional Bank has upgraded the integration between GRBonline and Quicken.   In addition to Web Connect and Express Web Connect, we now offer Direct Connect. Direct Connect supports a two way connection between GRBonline and Quicken. It allows you to import transaction data from GRBonline as well as make transfers between accounts and initiate bill payments, all within Quicken.

If you would like to upgrade your connection from Web Connect to Direct Connect, you will need to modify your Quicken settings to ensure the smooth transition of your data.

To complete these instructions, you will need your User ID and Password for GRBonline.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Documentation and Procedures

Task 1: Conversion Preparation
1. Back up your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up Your Data** and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Update Software** and follow the instructions..

Task 2: Disconnect Accounts for Web Connect or Express Web Connect
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.

Task 3: Reconnect Accounts to Direct Connect
1. Choose **Tools** menu > **Account List**.
2. Click **Activate Downloads**
3. Enter your **GRBonline ID** and **Password**.
4. Click **Connect**

5. 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**.

6. Click **Next**
7. Check the Sync to Quicken Cloud for Mobile & Alerts if you would like.
8. Click **Finish**.
9. After all accounts have been matched, click **Next**. The Transaction Download column of your account list will display Yes (Direct Connect) for each account.
10. Click **Done**.
11. You can verify that the account(s) are setup for initiating bill payments* by going to **Tools**>**Account List**. Click **Edit** next to the account.
12. 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**.
13. 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.