



# Quicken for Mac 2015-2018 – Direct Connect

The following instructions are provided by Quicken for clients who use these services. To ensure the service continues to operate properly after your upgrade to the new First Republic digital banking experience, we ask that you please follow the steps below. We greatly appreciate your understanding.

## Upgrade Instructions

As you upgrade to the new digital banking experience, you will need to modify your Quicken settings to ensure a smooth transition of your data. To complete these instructions, you will need to first sign in to the new digital banking experience once your upgrade is complete. Please sign in at [firstrepublic.com/bankingonline](http://firstrepublic.com/bankingonline).

You will need your First Republic username and password to complete the steps in Quicken.

**NOTE:** It is important that you perform the following instructions exactly as described and in the order presented. Otherwise, your service may stop functioning properly.



This detour symbol indicates instructions in a task specifically for **Bill Pay within Quicken**. If you do not use Quicken to make online bill payments, skip that task.

## Documentation and Procedures

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### Task 1: Preparation

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1. To ensure your data remains intact, please back up your data file. For instructions on backing up your data file, choose **Help** menu and **Search**. Search for “Backing Up” then select **Backing up data files**, and follow the instructions.
2. Once the backup is complete, please download the latest Quicken update. For instructions to download an update, choose **Help menu** > **Search**. Search for “Updates” then select **Check for Updates**, and follow the instructions.

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### Task 2: Once you have upgraded and signed in to the new digital banking experience, deactivate your account(s) labeled **First Republic Bank - Legacy** within Quicken.

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1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu. Then select **Settings**.
3. Select **Troubleshooting**. Then select **Deactivate Downloads**.
4. Repeat steps for each First Republic account to be temporarily disconnected.



You will not be able to deactivate accounts with payments in the "To Send" status. Please cancel these payments. *You will be able to recreate the payments once you have reactivated your account.*

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**Task 3:**      Reactivate your account(s) at **First Republic Bank**

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1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu. Then select **Settings**.
3. Select **Set up transaction download**.
4. Enter **First Republic Bank** in the **Search** field. Then select the institution in the Results list and click **Options**.
5. Select **Direct Connect** as the connection type. Then select **Continue**.
6. Enter your First Republic **Username** (Customer ID) and **Password** and click **Continue**. *It can take a few moments for the update to complete.*

**NOTE:** If you were assigned a First Republic Quicken access code, that code no longer applies. Please use your First Republic Digital Banking password in Quicken going forward.

8. In the **Accounts Found** screen, link each of your accounts to the matching account already listed in Quicken. Under the **Action** column, select **Link** to your existing account.

**NOTE:** Do NOT select **Add** under the action column unless you intend to add a new account to Quicken.

8. Once you have linked all accounts, select **Continue**.
9. Select **Finish**.



Now that you have reconnected your First Republic accounts, you can recreate any payments you may have canceled prior to disconnecting your account.

Thank you for making these important changes.

Please contact Banking Online Support at (855) 886-4819 for assistance.