



Quicken for Windows – 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 at firstrepublic.com/bankingonline once your upgrade is complete.

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

Task 1: Preparation

1. To ensure your data remains intact, please back up your data file. For instructions on backing up your data file, choose **Help** menu. Then choose **Quicken Help**. Search for “Backup Data File” 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. Then choose **Check for Updates**. Search for “Update Software” and follow the instructions.

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.

1. Choose **Tools** menu. Then choose **Account List**.
2. Click the **Edit** button of the account you intend to deactivate.



3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click on **Deactivate**. Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Delete "First Republic Bank" in the financial institution field. Click **OK** to close the window.
7. Repeat steps for each account you are disconnecting.

NOTE: You must accept all downloaded transactions on an account prior to deactivating an account.



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.*

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

1. Choose **Tools** menu. Then choose **Account List**.
2. Click the **Edit** button of the account you want to activate.
3. In the **Account Details** dialog, click the **Online Services** tab.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter **First Republic Bank** in the search field. Select the name in the list and click **Next**.
7. If presented with the Select Connection Method screen, select **Direct Connect**.
8. Type your First Republic **Username** and **Password** and click **Connect**.

If you were assigned a First Republic Quicken access code, that code no longer applies.

NOTE:

Please use your First Republic Digital Banking password in Quicken going forward.

9. Ensure you link the account to the matching account listed in Quicken. You will want to select **Link - to an existing Quicken account** and select the matching accounts in the drop-down menu.

NOTE: Do NOT choose **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, choose **Ignore – Don't Download into Quicken**.

11. After all accounts have been linked, click **Next**. You will receive confirmation that your accounts have been added.
12. Click **Finish** and then **Done**.

Thank you for making these important changes.

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