



FIRST REPUBLIC BANK

Quicken for Mac 2015-2016 – Express Web 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 your First Republic online banking username and password.

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 conversion should take 15– 30 minutes.

Documentation and Procedures

Task 1: Upgrade Preparation

1. To ensure your data remains intact, please back up your data file. For instructions on how to do this, please choose the **Help** menu > **Search**. Search for “**Backing Up**,” 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 the **Help** menu > **Search**. Search for “**Updates**,” select **Check for Updates**, and follow the instructions.
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Task 2: Now that you have upgraded to the new digital banking experience, Deactivate Your Account(s) labeled **First Republic Bank** within Quicken

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Troubleshooting** > **Deactivate Downloads**.
4. Repeat steps for each account at **First Republic Bank**.



Task 3: Reactivate Your Account(s) at First Republic - Digital Banking

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download**.
4. Enter “**First Republic - Digital Banking**” in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Enter your username and password and click **Continue**.

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

6. If extra information is required, please enter it to continue.

NOTE: Select **Express Web Connect** or **Quicken Connect** for the “Connection Type” if prompted.

7. In the **Accounts Found** screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select **Link** to pick your existing account.

IMPORTANT: Do **NOT** select “ADD” under the action column.

8. Select **Finish**.

Thank you for making these important changes!

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