



FIRST REPUBLIC BANK

# Quicken for Mac 2015-2016 – 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 conversion 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

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### Task 1: Upgrade Preparation

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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 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: Deactivate Your Account(s) labeled **First Republic Bank** within Quicken

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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 First Republic account.



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**Task 3:** Now it's time to reactivate Your Account(s)

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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. Log in to your online banking page at [firstrepublic.com](http://firstrepublic.com). **Download** a file of your transactions to your computer.
6. Take note of the date you last had a successful connection. If you have overlapping dates in the web connect process, you may find duplicate transactions.
7. Drag and drop the downloaded file into the box Drop download file.

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

8. 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.

9. Select **Finish**.
10. Repeat steps for each account you are reactivating in Quicken.

Thank you for making these important changes!

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