

Product: Quicken Windows Express Web Connect

As RSI Bank completes its system conversion to Columbia Bank, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your login credentials for online banking.

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.

Thank you for making these important changes!

You should be linking to Columbia Bank NJ QK Personal.

By 10/14/2022 at 5pm:

1. Back up your Quicken Windows Data File from your RSI Quicken connection.
 - a. Go to **File > Backup and Restore > Backup Quicken File**.
2. Download the latest Quicken Update.
 - a. Go to **Help > Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

After noon on 10/17/2022:

1. Deactivate online banking connection for accounts connected to the financial institution that is requesting this change.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Financial Institution and Account Number information. Click **OK** to close window.
 - g. Repeat steps for any additional accounts that apply.
2. Reconnect the online banking connection for your accounts to Columbia Bank.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account you want to activate.
 - c. In Account Details, click **Online Services** and then choose **Set up Now**.
 - d. Type your institution's name in the search field and click Next.
 - e. Enter your financial institution credentials.
 - Express Web Connect uses the same credentials you use for your institution's online banking login.
 - Direct Connect might require credentials that do not match your online banking credentialsImportant: If your credentials do not work, contact your financial institution.
 - f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken.
 - Select **Link to an existing account** and select the matching accounts in the drop-down menu.Important: Do NOT choose "Create a new account" unless you intend 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 or click Cancel.
 - g. After all accounts have been matched, click **Next** and then **Done**.