HERITAGE
BANK OF COMMERCE®

Quicken for Windows

Direct Connect Conversion Instructions

As ***Heritage Bank of Commerce*** completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your login credentials for the ***Heritage Bank of Commerce*** online banking.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

This update is time sensitive and can be completed on or after ***April 7, 2014***

Conversion Preparation

- Backup your data file. For instructions to back up your data file, choose **Help** menu > **Quicken Help**. Search for ***Backup Data File*** and follow the instructions.
- Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Quicken Help**. Search for ***Update Software*** and follow the instructions.

Deactivate Your Account(s) At Heritage Bank of Commerce

1. Choose **Tools** menu > **Account List**.

2. Click the **Edit** or **Edit Details** button of the account you want 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 **Deactivate** or **Remove from One Step Update**. Follow the prompts to confirm the deactivation.

NOTE: The name of the buttons referenced above may vary depending on the services you currently use and the version of Quicken you are using.

6. Click on the **General** or **General Information** tab. Remove the **Account Number**.

7. Remove the name of the **Financial Institution**. Click **OK** to close the window.

8. Repeat steps 2 – 7 for each account at ***Heritage Bank of Commerce.***

9. **Re-activate Your Account(s) at Heritage Bank of Commerce NEW.**

10. Open the account register that you want to enable for online account access.

11. Choose **Account Actions** menu > **Set Up Online**.

12. Enter ***Heritage Bank of Commerce NEW*** and click **Next**.

13. Type your **User ID** and **Password**. Click **Connect**.

NOTE: You may be presented with a security question from your Financial Institution prior to receiving your accounts.

14. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select Link or Exists in Quicken and select the matching accounts in the drop-down menu.

IMPORTANT: Do NOT select New or Add In Quicken. If you are presented with accounts you do not want to track in this data file, select Ignore – Don't Download into Quicken.

15. After all accounts have been matched, click Next.

You will receive confirmation that your account(s) have been added.

16. Click Done or Finish.

Thank you for making these important changes!