

QUICKEN HOW-TO GUIDE

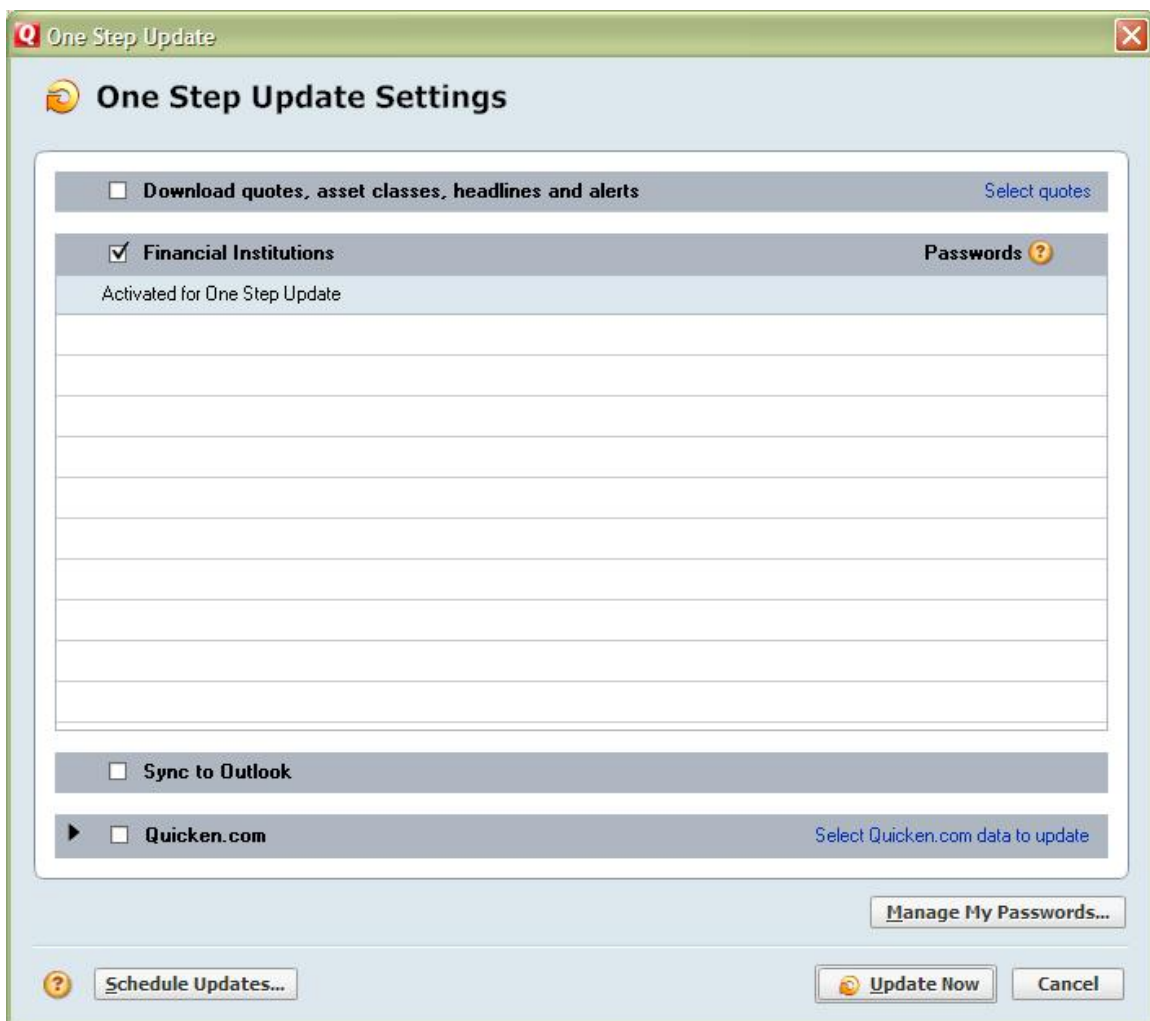
This short guide should help you reconfigure your Quicken software to connect to Amplify's new online banking server! If you are a new Amplify member and did not use Quicken with our old online banking, you should skip to the "activate express web connect" section.

BACK UP YOUR CURRENT DATA

Choose File menu > Backup and specify which file to back up, where to save it, and then click OK.

DOWNLOAD THE LATEST QUICKEN UPDATE

Choose Online menu > One Step Update. (Update button for Quicken 2010). Be sure to check "Financial Institutions". If any updates are available, you will be prompted to apply it. Do so, then restart Quicken.



DEACTIVATE DIRECT CONNECT FOR ALL AMPLIFY ACCOUNTS

Right-click an account from the list of accounts under Cash Flow Center. Choose Edit Account.

Click the Online Services tab. Depending on your version of Quicken, you may see a 'Transaction Download' section, an 'Online Payment' section or you may just see 'One Step Update'.

In any of these cases, you want to **deactivate** this option. **Do these steps for all your Amplify accounts.** Verify that each account is deactivated by choosing Tools menu > Account List. As each online account is deactivated, the word Activated disappears for each account in the Online Services column.

ACTIVATE EXPRESS WEB CONNECT

Quicken 2009: Choose menu Online > Online Account Services Setup

Quicken 2010: Go to the account register, click Account Actions button, Set Up Online option.

This screen is for a brand new setup (Quicken 2009). If you had accounts already, your accounts will likely be listed in the Account Name window.

Online Account Setup

Do you want to create a new Quicken account or use an existing one for your online services?

Create New Quicken Account

Edit Existing Quicken Account

<i>Account Name</i>	<i>Type</i>
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? Cancel Next

Select Checking

The screenshot shows a window titled "Account Setup" with a close button in the top right corner. The main area is titled "Select an account type" and contains a list of radio button options:

- Checking
- Savings
- Credit Card
- Cash
- Investing/Retirement
- Asset
- Debt (not including credit cards)
- Loan

At the bottom of the window, there are "Cancel" and "Next >>" buttons. On the right side, there is a "Help" section with the text: "I'm not sure what to select" and "What if this is for my business?"

Choose Amplify FCU. The other listing is deactivated and will eventually be dropped from the menu. **DO NOT CHOOSE "Amplify Federal Credit Union".** It will NOT work! **If Amplify FCU is not listed, you need to do the One-Step Update as detailed above.** **Not doing this step correctly gives the OL 301-B error message Your Financial Institution has rejected your request.**

The screenshot shows a window titled "Account Setup" with a close button in the top right corner. The main area is titled "What is the financial institution for this account?" and contains the following elements:

- A radio button option: The account is held at the following institution
- Text: "Select a letter or phrase to find your financial institution"
- A row of buttons: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
- Buttons: "Bank of ...", "First ...", "1st ..."
- Text: "Enter the name of your financial institution or select from a list by clicking the buttons above."
- A list box containing:
 - Amplify FCU (highlighted)
 - Amplify FCU
 - Amplify Federal Credit Union

At the bottom of the window, there are "Cancel", "<< Back", and "Next >>" buttons. On the right side, there is a "Help" section with the text: "Why does Quicken want to know my bank?", "How does Quicken protect my financial information?", "What if I don't enter the name of my financial institution?", and "How does Quicken work with my financial institution to protect my data?"

Choose **Yes**.

Account Setup

Transaction download available!
This allows you to get information from your bank without leaving Quicken.

Do you want to download your balance and account activity directly from your bank using Quicken?

Yes, connect to Amplify FCU through Quicken (recommended option)

Your password and data are secure. Find out how Quicken protects you.

No, I'll visit my bank web site to download transactions into Quicken myself

No, I'll manually enter my transactions into Quicken

Help

I am not sure what to select

What does automatic download mean?

Learn more about downloading activity from your account

Can you explain these options?

How does Quicken protect my financial information?

How does Quicken work with my financial institution to protect my data?

Cancel << Back Next >>

Provide your Amplify Online Banking login credentials (Account number and password).

Account Setup

Transaction download available!
This allows you to get information from your bank without leaving Quicken.

Log in to enable transaction download in Quicken

Log in using my Amplify FCU ID and Password

Amplify FCU User ID / username

Amplify FCU password

Reenter password

Your password and data are secure. Find out how Quicken protects you.

I do not have a Amplify FCU user name and password
(I have never logged in to my Amplify FCU web site)

Help

What login information should I use?

What does automatic download mean?

How does Quicken work with my financial institution to protect my data?

Cancel < Back Next >

After a few moments, it will return this screen. Choose the accounts for which you want to download data, and choose the account in Quicken you wish to link it to (if applicable).

The screenshot shows the 'Account Setup' window in Quicken. At the top, it says 'Quicken found the following accounts at Amplify FCU.' Below this, there is a section titled 'Check the accounts you'd like to add to Quicken.' This section contains a table with columns for 'Select', 'Account', 'Type', and 'Account Name (to use in Quicken)'. There are six rows of accounts, each with a checked 'Select' box. The 'Account' column lists 'Membership Share', 'Savings', 'Savings', 'Draft', 'Checking', and 'Checking'. The 'Type' column lists 'Checking', 'Checking', 'Credit Card', 'Checking', 'Checking', and 'Checking'. The 'Account Name' column has radio buttons for 'New In Quicken' and 'Exists In Quicken', followed by a text input field with the placeholder 'Enter account nickname'. At the bottom of the window, there are 'Cancel' and 'Next >>' buttons. On the right side, there is a 'Help' section with text: 'I don't see the account I want to add' and 'I'm already tracking some of these in Quicken, what should I do?'.

Select	Account	Type	Account Name (to use in Quicken)
<input checked="" type="checkbox"/>	Membership Share	Checking	<input type="radio"/> New In Quicken <input type="text" value="Enter account nickname"/> <input type="radio"/> Exists In Quicken
<input checked="" type="checkbox"/>	Savings	Checking	<input type="radio"/> New In Quicken <input type="text" value="Enter account nickname"/> <input type="radio"/> Exists In Quicken
<input checked="" type="checkbox"/>	Savings	Credit Card	<input type="radio"/> New In Quicken <input type="text" value="Enter account nickname"/> <input type="radio"/> Exists In Quicken
<input checked="" type="checkbox"/>	Draft	Checking	<input type="radio"/> New In Quicken <input type="text" value="Enter account nickname"/> <input type="radio"/> Exists In Quicken
<input checked="" type="checkbox"/>	Checking	Checking	<input type="radio"/> New In Quicken <input type="text" value="Enter account nickname"/> <input type="radio"/> Exists In Quicken
<input checked="" type="checkbox"/>	Checking	Checking	<input type="radio"/> New In Quicken <input type="text" value="Enter account nickname"/> <input type="radio"/> Exists In Quicken

NOTES:

- Please review carefully the first few downloads before choosing the “accept all” option. Since this is a new Online Banking server and software, Quicken may not recognize entries from the new download that are already in your register. *If you “accept all” you may end up with duplicate transactions in your register!*
- Transactions listed in the “current day” section of your online account history will not be downloaded. Only those transactions in the “posted” section of account history are downloaded.
- Quicken only supports the downloading of Savings, Checking, and Open-End Loan account types. IRA, Certificates, or other Loan type history will not download.