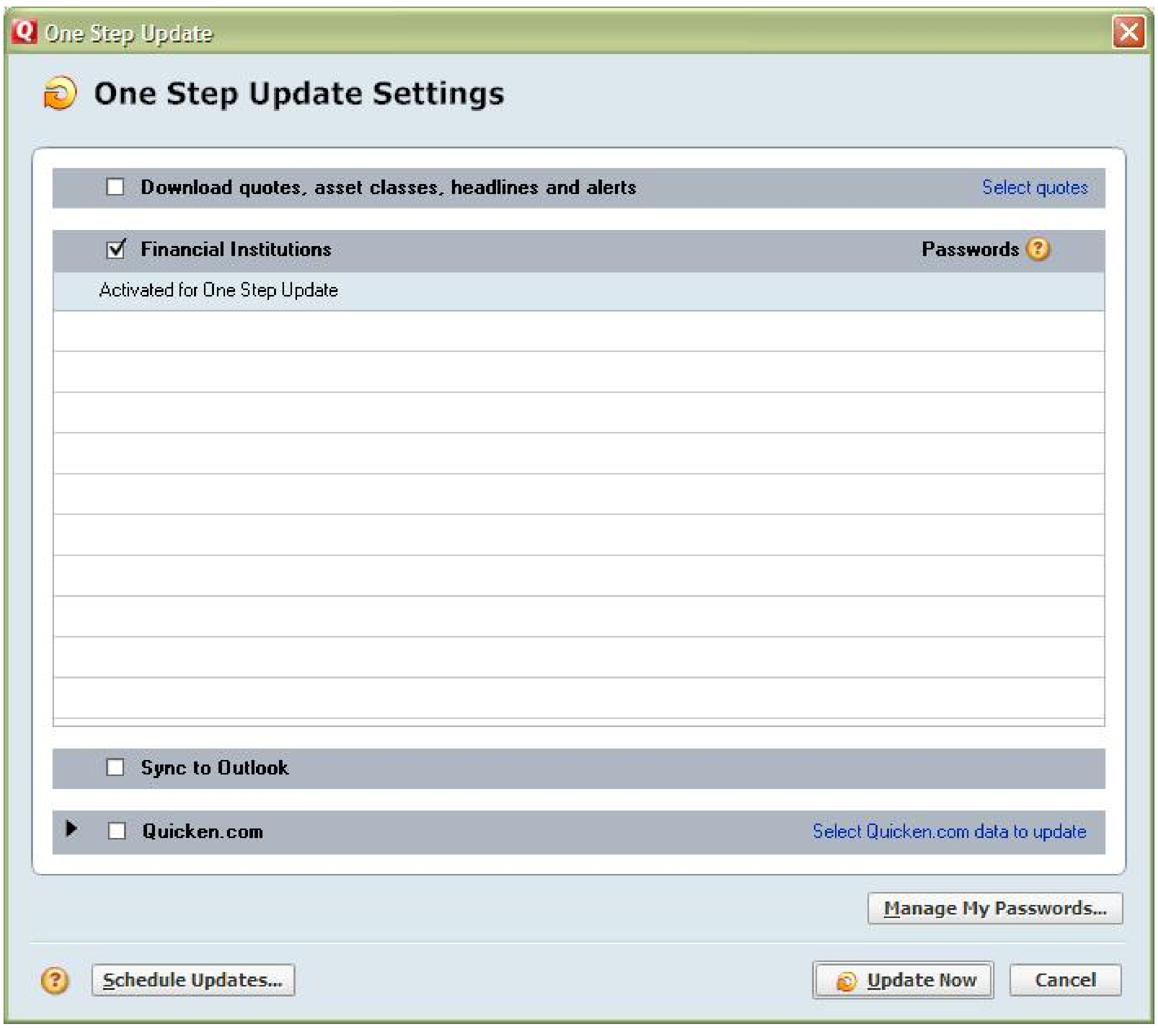
QUICKEN HOW-TO GUIDE

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'.

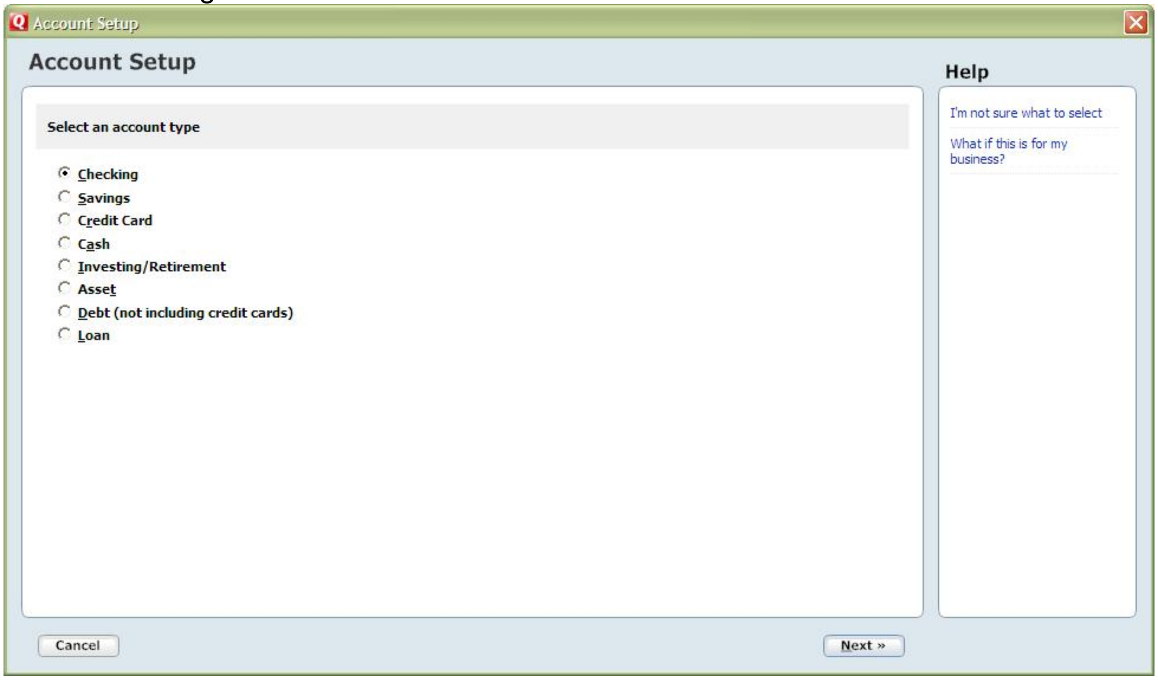
In any of these cases, you want to **deactivate** this option. **Do these steps for all your Amplify accounts.** Verify that each account is deactivated by choosing Tools menu > Account List. As each online account is deactivated, the word Activated disappears for each account in the Online Services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

ACTIVATE EXPRESS WEB CONNECT

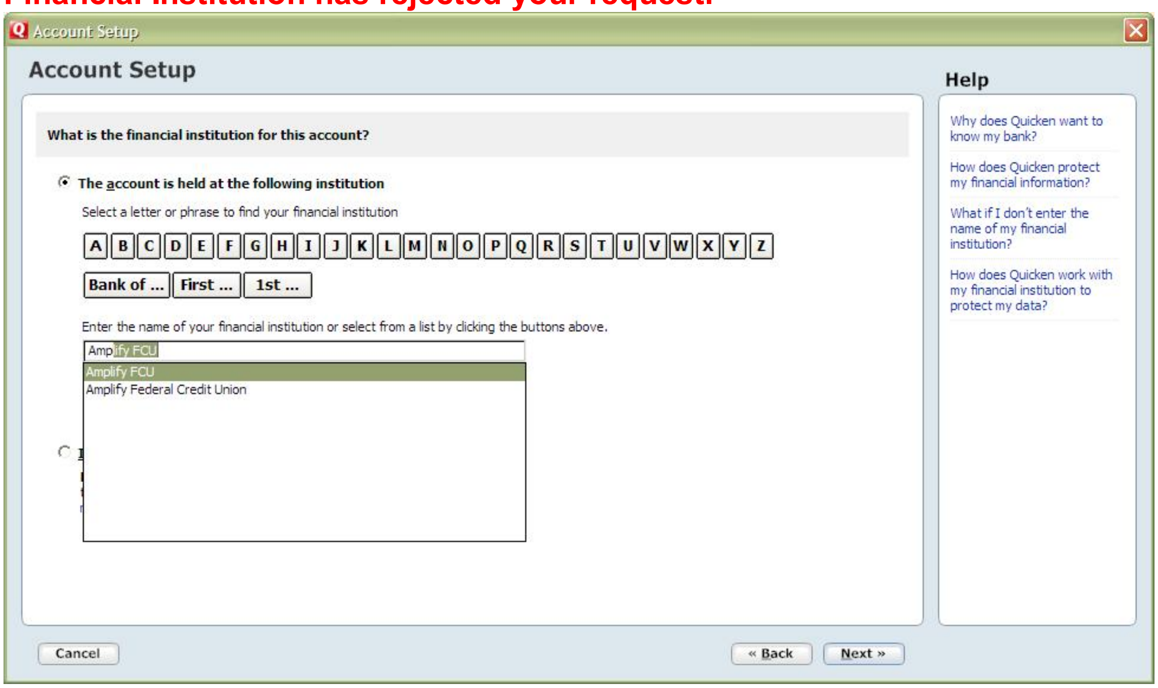
Quicken 2009: Choose menu Online > Online Account Services Setup
Quicken 2010: Go to the account register, click Account Actions button, Set Up Online option.

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.

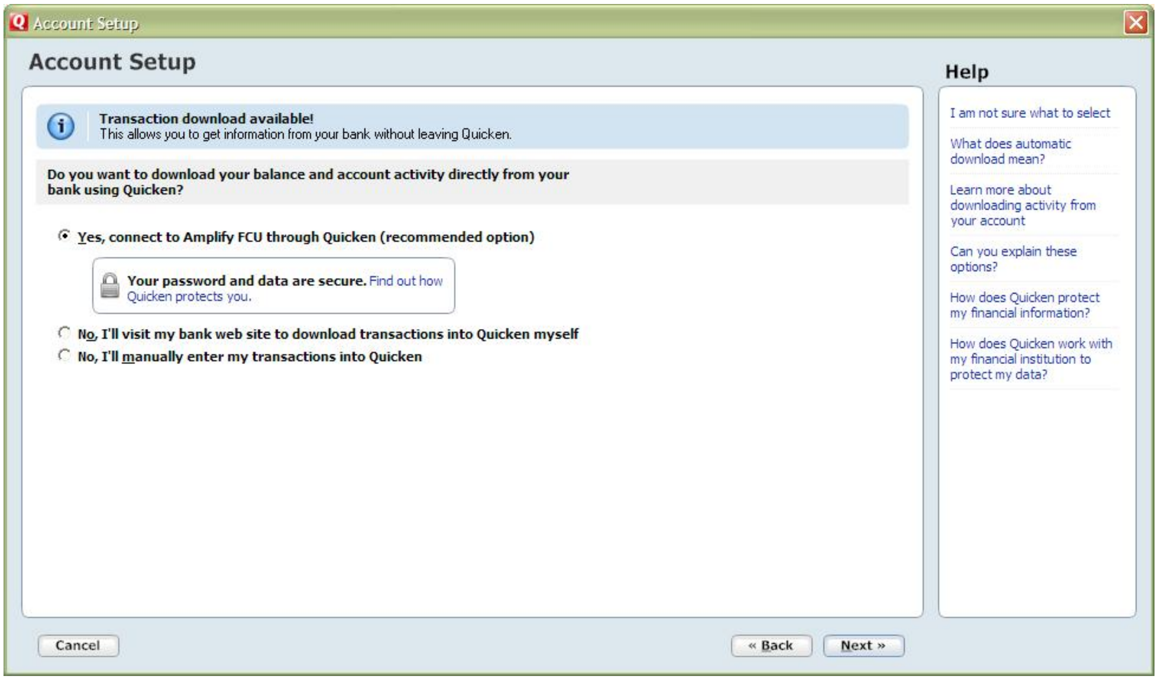
Select Checking



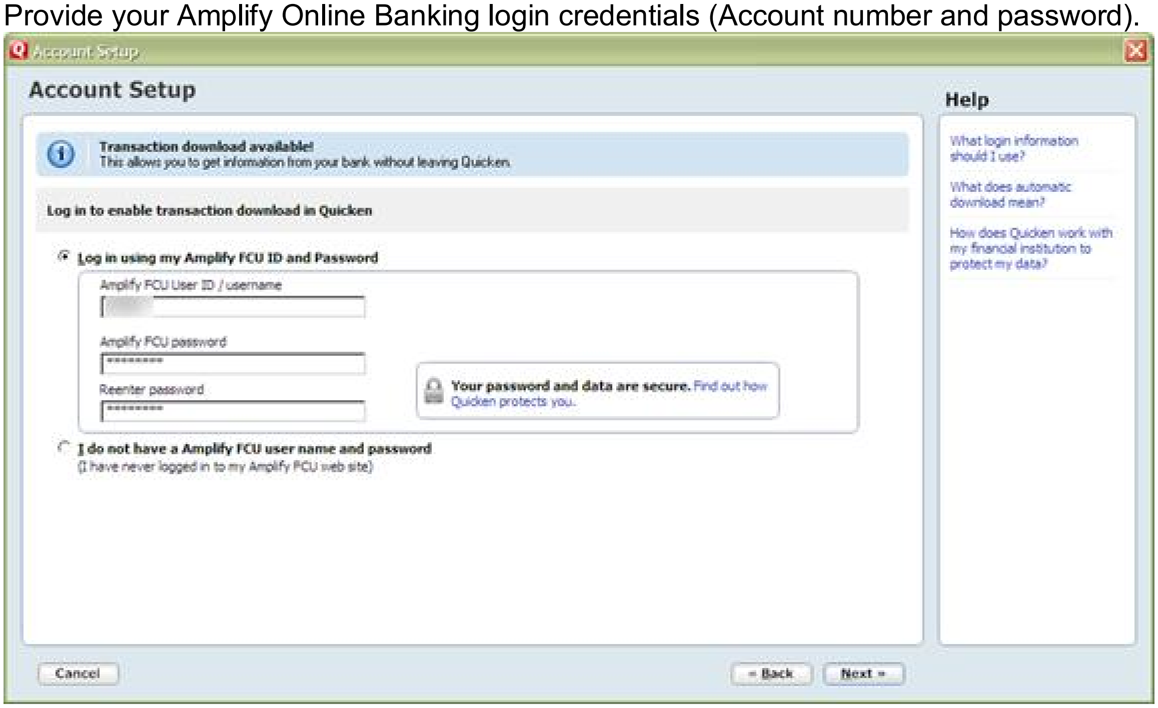
Choose Amplify FCU. The other listing is deactivated and will eventually be dropped from the menu. DO NOT CHOOSE "Amplify Federal Credit Union". It will NOT work! **If Amplify FCU is not listed, you need to do the One-Step Update as detailed above.** **Not doing this step correctly gives the OL 301-B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



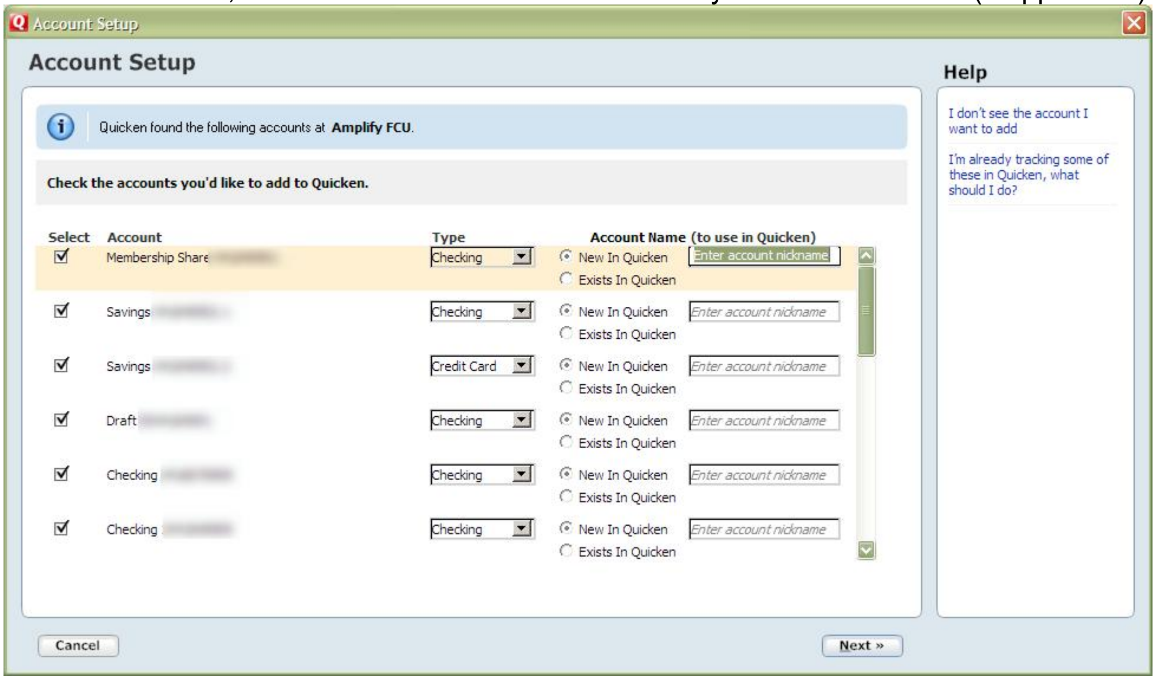
Choose **Yes.**



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



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).



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.