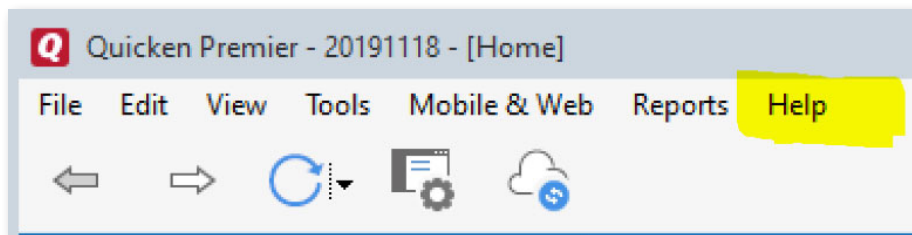


# QUICKEN® FOR WINDOWS TROUBLESHOOTING GUIDE

If you are experiencing problems with Quicken for Windows, the steps below may help resolve the issue.

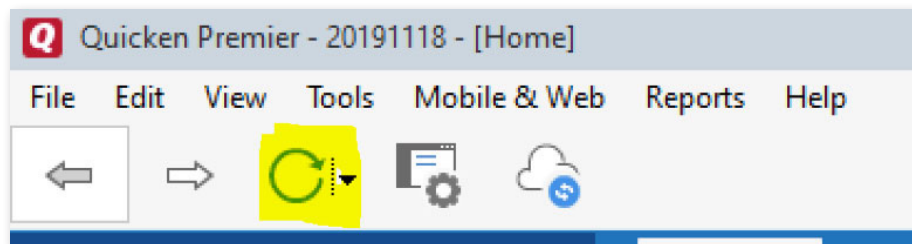
## STEP 1: Update Quicken to the latest version.

Launch the Quicken application > Click Help > Check for Updates.

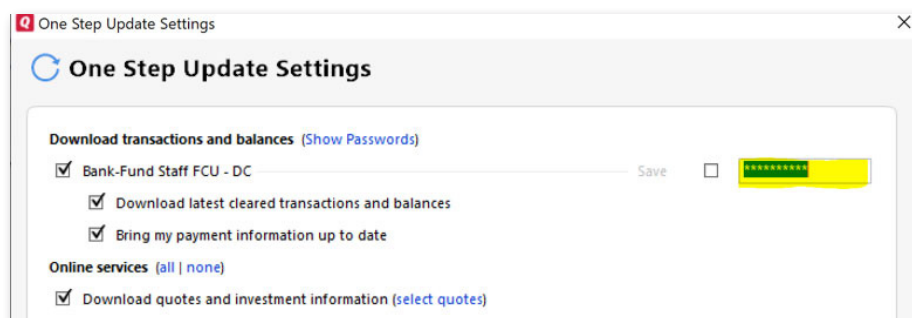


If an update is available, please install it and re-open Quicken. If you receive a message that you already have the latest version, continue to Step 2.

## STEP 2: Attempt a One Step Update.

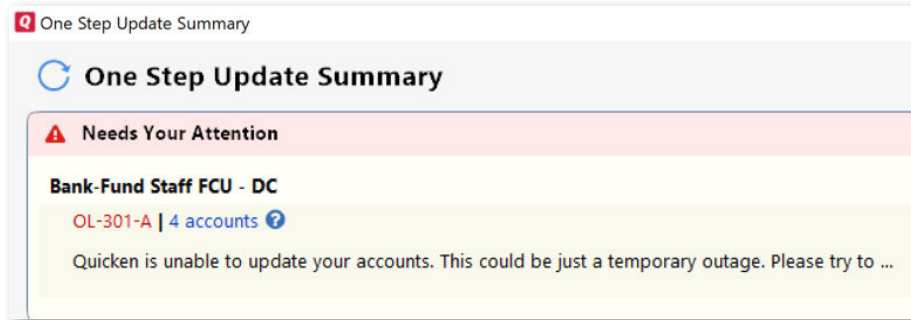


Enter your Digital Banking password.





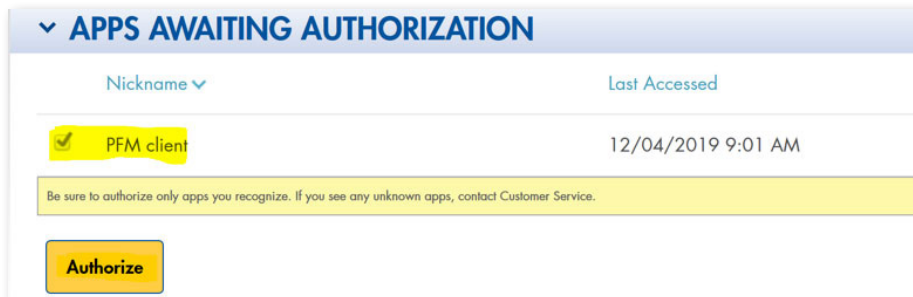
If you receive the error message pictured below, check to make sure you have authorized the Quicken connection in digital banking.



To confirm authorization, login to Digital Banking, click the "Budgeting" tab and select "Authorized Apps."

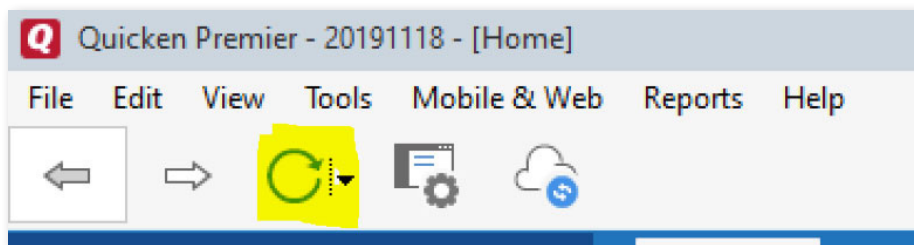


Under "Apps Awaiting Authorization" you should see a pending "PFM client." Click the checkbox and click "Authorize."



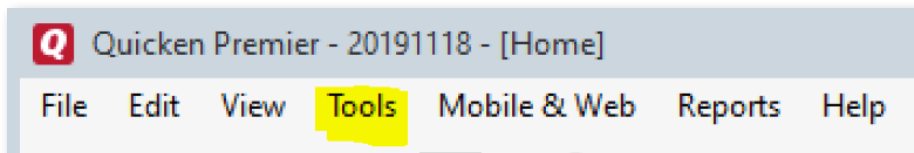
Return to Quicken and retry the One Step Update.

### STEP 3: Return to Quicken and retry the One Step Update.

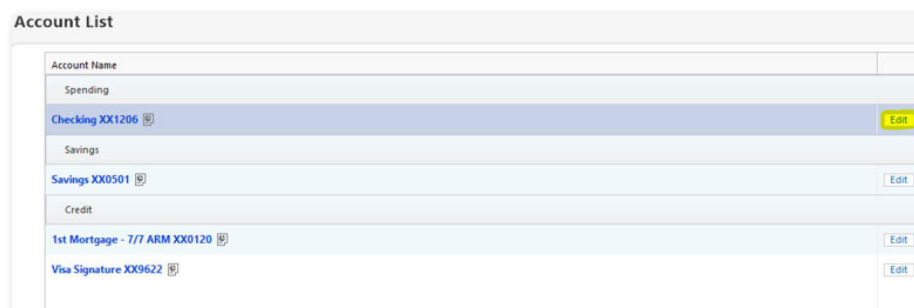


If you still receive an error message, the next step is to check the Bill Pay setting in Quicken. Please note, this setting in Quicken will not impact your Bill Pay in Digital Banking. This setting only applies to Quicken.

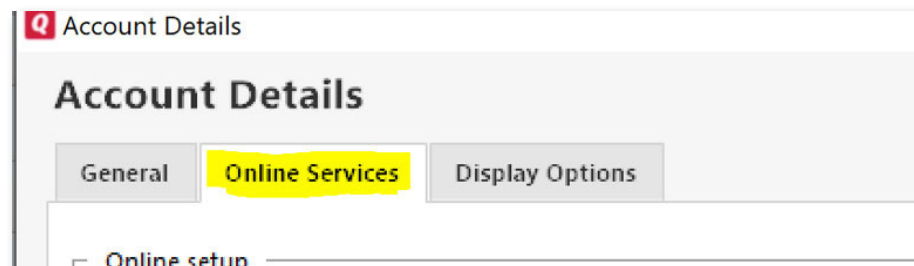
### STEP 4: On the main screen of Quicken, click Tools > Account List



Under the list of accounts, click the "Edit" link next to the Checking account. Please note, if you have multiple checking accounts you may have to repeat this step multiple times for all Checking accounts.

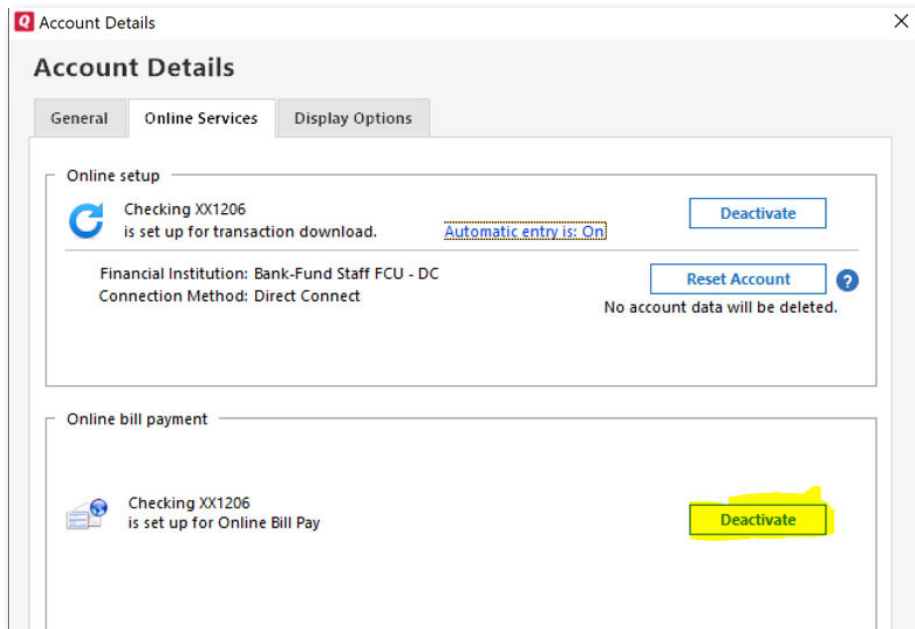


On the Account Details page, click the "Online Services" tab.



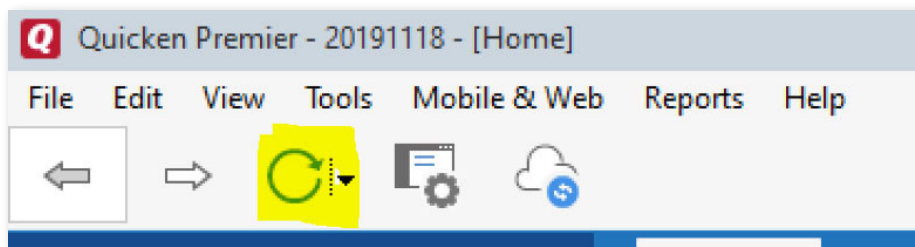


Under the Online bill payment section, click "Deactivate."



Click "Yes," "OK" and then "Done" to apply the changes and return to the main page of Quicken.

Retry the One Step Update



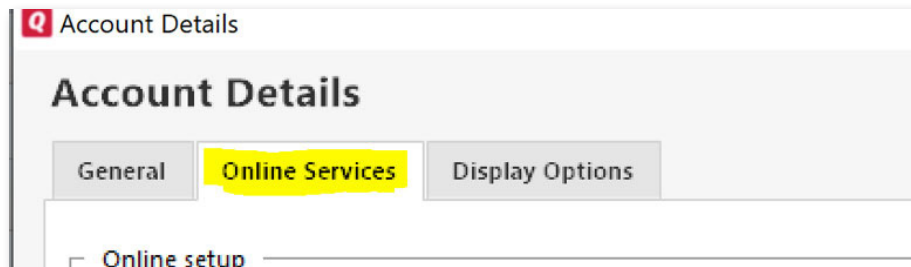
This should resolve the issue, if not please proceed to the next step.

## STEP 5: Confirm that the institution being connected is Bank-Fund Staff FCU - DC

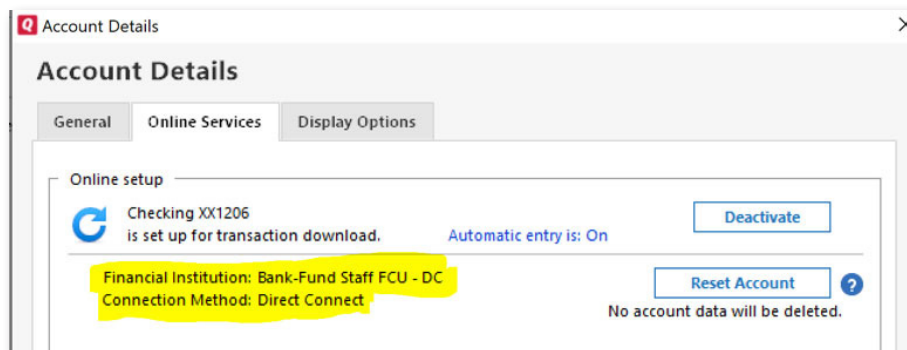
To check what institution you are connecting to, from the main page of Quicken, right click the checking account and select Edit/Delete account.



On the Account Details page, click the Online Services tab.



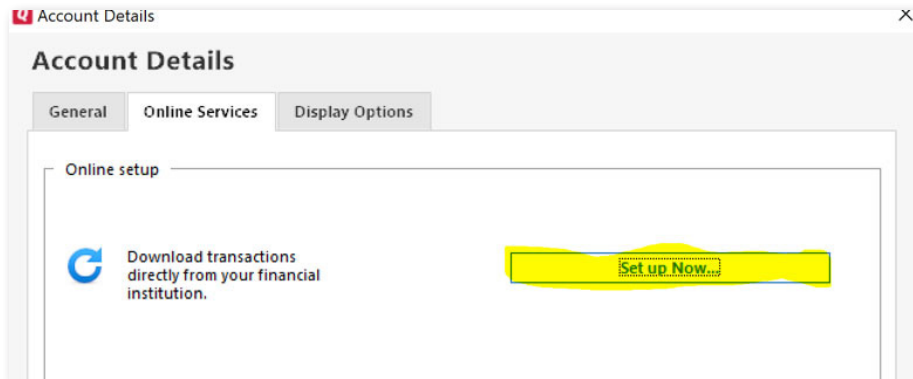
On the Account Details page, if the Financial Institution is not Bank-Fund Staff FCU - DC or if the Connection Method is not "Direct Connect" then you will need to deactivate the account and set it up again.



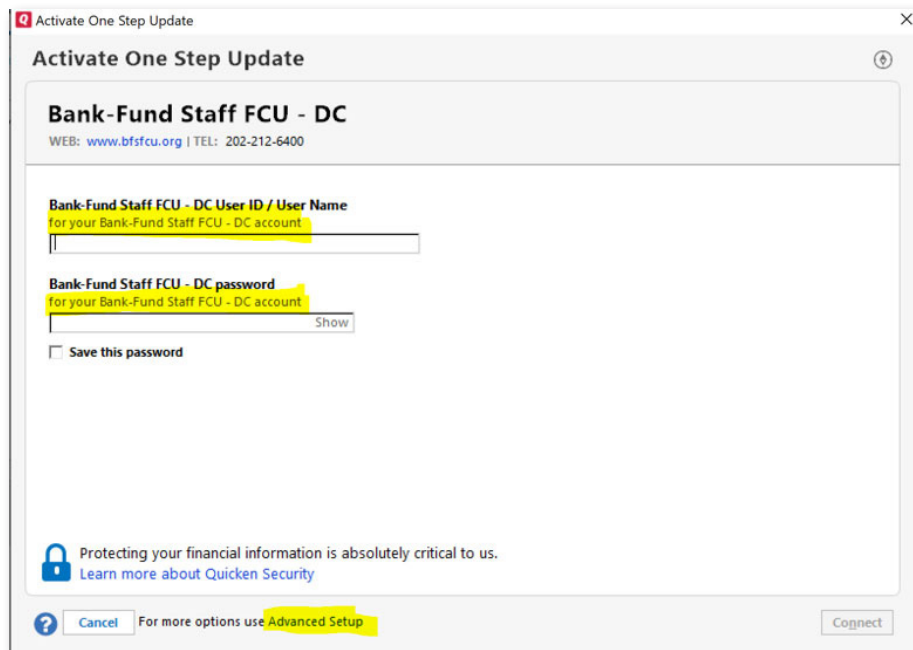
To deactivate the account, click the "Deactivate Account" button.



Once deactivated, on the same Account Details page, click “Set up now...”



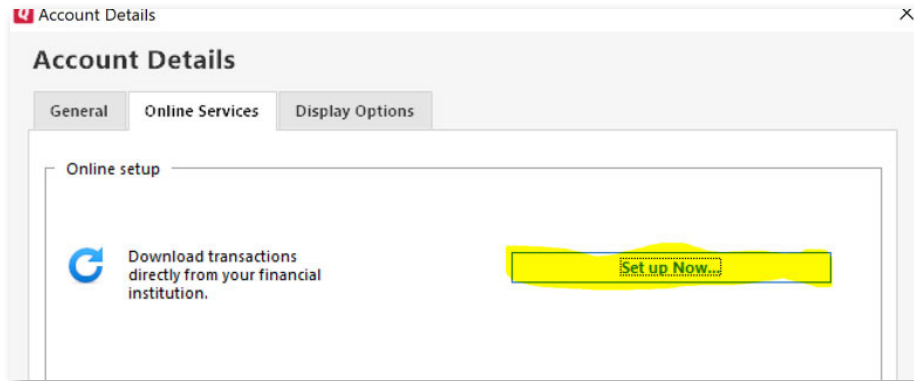
While on the Activate screen, please confirm Bank-Fund Staff FCU – DC is listed as highlighted below. If it is, then go ahead and enter your digital banking User Name and Password. If the credit union name does not match “Bank-Fund Staff FCU – DC” exactly, please do not enter the User Name and Password. Instead, click the “Advanced Setup” link at the bottom of the page.



If you clicked “Advanced Setup,” search for the Bank-Fund Staff FCU – DC name, then enter your User Name and Password and click “Connect.”



You should then see all of your accounts listed.



Click "Next" to finish the activation.

