# USING QUICKEN<sup>™</sup> DIRECT CONNECT & WEB CONNECT

Quicken<sup>™</sup> uses three ways to download from and interact with your bank:

- Web Connect is, simply put, a way you can download your transactions directly from your bank's website and import them into Quicken<sup>™</sup>.
- With the Direct Connect and Express Web Connect/Quicken<sup>™</sup> Connect methods, Quicken<sup>™</sup> communicates directly with WestStar on your behalf. You do not need to sign in to online banking and manually download transactions - Quicken<sup>™</sup> does this for you.

## How do I add a Direct Connect account?

Quicken<sup>™</sup> has several videos to help you set up your account:

- Direct Connect (for Windows)
- Direct Connect (for Mac)

## I currently have an account. How do I know what method I am using?

- Choose the **Tools** menu in the upper left then select **Account List**. Click **Edit** next to your account, then choose the **Online Services** tab at the top.
- On a Mac, choose your account on the left, then click **Settings** on the bottom right.

# How do I change the connection method on an account?

For Windows:

- 1. Within Quicken<sup>™</sup>, click on **Tools** > **Account List**.
- 2. Click on Edit.
- 3. On the Account Details dialog box, go to the Online Services tab.
- 4. Click on **Change connection method** if the option is there. If not, click **Deactivate** instead.
- 5. Once the account has been deactivated, click on Set up now.
- 6. Select the connection method and click **Next**.
- 7. Enter your credentials and click **Connect**.
- 8. When Quicken<sup>™</sup> has returned all accounts discovered for WestStar, carefully **LINK** each of the found accounts to the appropriate accounts you already have set up in Quicken<sup>™</sup>.
- 9. Click **Next**, then **Finish**.

For Mac:

- 1. Within Quicken<sup>™</sup>, click on the account name for your account(s) in the Account toolbar.
- 2. Click the **Settings** icon in the bottom right corner of the screen.
- 3. Select the **Downloads tab.**
- 4. Click on **Change Connection Type**.
- 5. To see the connection methods available, click **Options.**
- 6. Continue with the setup.

## I received a Quicken message for Error CC-800. What do I need to do?

A Quicken Error CC-800 is one of the most common problems and can arise due to multiple reasons.

## Task 1: Ensure Quicken Version is the Latest

- 1. In Quicken, go to Help > Check for Updates.
- 2. If an update is available, follow the on-screen instructions to download it. If Quicken is already running with the latest release, proceed with Task 2.

#### Task 2: Refresh Your Online Account Information

- 1. Open Quicken register.
- 2. Go to the account with the error from the account bar.
- 3. Click on the top right-hand side gear icon and select Update Now (Ctrl+Alt+U).



- 4. Enter the requested information (your bank account, username, and password).
- 5. Click Update Now.

#### Task 3: Deactivate the Account

1. Go to Tools > Account List > Click on Edit (for the account with the error).



- 2. On the Online Services tab, click Deactivate.
- 3. Click **Yes** to confirm, then **OK**.

#### Task 4: Verify Quicken Files

1. Go to File > File Operations > Validate and Repair.

_					
File	Edit View Tools Reports Help				
	New Quicken File		1		
	Open Quicken File	Ctrl+O	(Evorers Web Connect)		
	Save a copy as		All Transactions 💌 Reset		
	Show this file on my computer		Pavee		
	Set Password for this data file		Opening Balance		
	Set Password to modify transactions		# Payee		
	Backup and Restore	>			
	File Import	>			
	File Export	>			
	File Operations	>	Сору		
	Printer Setup	>	Year-End Copy		
	Print Checks		Validate and Repair		
	Print Test Account	Ctrl+P	Find Quicken Files		

- 2. Check Validate File.
- 3. Click OK.

At Banactions		Test Account						
Test Account		All Dates	- [An	y Type	an Trans	don 💌 ked		
		-	P Cate 13-Jun-10 8: 20-Jun-10		Paper Opening Paper	Validate and Repair Your Guiden P Validate and Repair Y	e Your Quicken File	×
						Types suspect data does the data, report on any the data, report on any the first part of the data.	age in your Quicken file, use this sources found, and then repair the seen Defa.QDF	dity to validate damaged tile.
						De geschate für	A Important: Validate your Quicken data fil data damage.	e f you susped
						I <sup>-</sup> Rebuild investing lats	A Important: This takes a free minutes to co found, your cost back valuation	mplete. If errors are one could change.
						l" Delete overling price holory	A supportant Delete your investing price his norpect data damage. You pri rebuilt after deletion, but pric years will be lost.	tory only if you or hotory will be es older than five
						I" Reset all Quicken prigter setting	Bhis will not affect your finance	al detai
						Valorie & Repair Lop	П	OK Canoel

- 4. Quicken will validate the file (It may take some time depending on your file size).
- 5. Once validation has completed, check the **DATA\_LOG** for any errors.

## Task 5: Reactivate the Account

- 1. Go to **Tools** > **Account List** and click on **Edit** (for the account with the error).
- 2. On the Online Services tab, click Set Up Now.

Main Vers	View 2								
0	Account Lie								
Coverage	ccount List								
1000		C Account Details X							
~ •	Account Name	August Batelle	Current Balance						
	Spending	Account Details							
	Test Access #	General Online Services Display Options	100.00						
		Online untup							
		Constant transmission							
		directly from your financial Set up Now							
		107083							
		Online bill payment							
		E keing Quicken. Set op Now_							
1000									

- 3. In the next window, enter your bank information then click Continue.
- 4. Check **Save This Password** (It may ask to put the vault password or Quicken ID/ password).
- 5. Click Connect.

Deposit and loan products are offered through WestStar Bank, Member FDIC.

6. Select Link from the dropdown menu.

We found the following		Nickname
Business Checking	Checking	Link  Business Checking
		Add - add to Quicken           Image: Add - add to Quicken         Image: Add - add to Quicken           Image: Add - add to Quicken account         Image: Add - add to Quicken
		Ignore - Don't download into Quicken

7. Click **Next** and **Finish**.

# How do I connect my account with Web Connect?

To activate a Web Connect account:

- 1. On the WestStar online banking website website, click the option to download your account information as a Web Connect (QFX) file. If prompted, click **Open**.
- 2. If this is the first time you have downloaded information for this account, or if Quicken<sup>™</sup> cannot determine which account to download the transactions into, you are prompted to identify the Quicken<sup>™</sup> account you use to track this financial information.
  - If you have set up an existing Quicken<sup>™</sup> account for this account, click Account already exists, then choose the account nickname from the drop-down menu.
  - If you have not yet set up a Quicken<sup>™</sup> account for this account, click Create a new Quicken<sup>™</sup> account, and then click Continue.
- 3. After clicking **Continue**, your recent account history is downloaded from WestStar to Quicken<sup>™</sup>. Depending on the amount of information being sent, you may see a progress bar indicating how much of the transfer is complete.
- 4. When your recent account history has been transferred, accept the downloaded transactions into Quicken<sup>™</sup>.
- 5. After the initial download and processing, you can download the Web Connect file from the Online Center window by clicking **Update/Send**.

**Note:** With Web Connect, you cannot send email, make online transfers, or make payments through Quicken<sup>™</sup>. However, these functions are available through Direct Connect.