

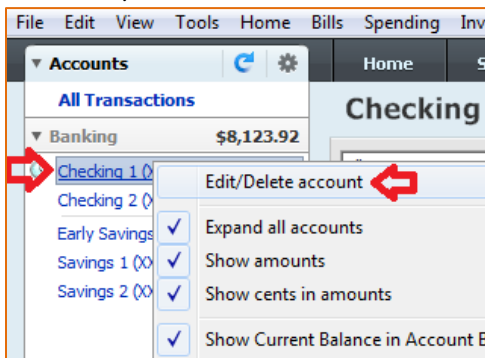
Connect Quicken with Direct Connect to your VeraBank Online Banking

Before proceeding through these instructions we would also recommend that you backup your Quicken files. To backup go to Files > Backup.

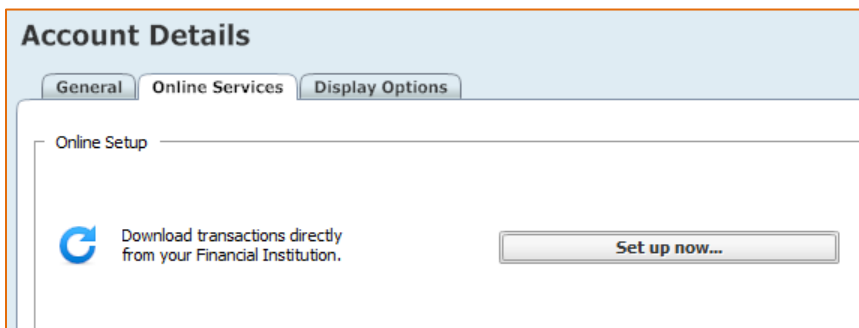
Direct Connect

If you have not already, you will need to register for a VeraBank Online Banking

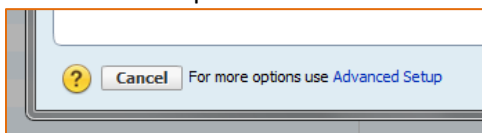
1. Login to VeraBank Online Banking
2. Login to VeraBank Online Banking through a browser
3. Go to "Other Services" and click on "Connectivity for Quicken® and QuickBooks®"
4. Enter and re-enter the password you want to use for Direct Connect
5. Accept the terms and click the "Submit" button
6. Open Quicken
7. Right-click on the account that needs to be connected
8. Click "Edit/Delete account"



1. Go to the "Online Services" tab
2. The "Online Services" tab will have a "Set up now..." button, click this button to establish an Direct Connect connection to VeraBank



9. The "Activate One Step Update" screens will begin, at the bottom of this screen click the "Advanced Setup" link



10. Check the radial button next to "I want to select the connection method used to download my transactions", then in the "Enter the name of your financial institution" box look for **VeraBank**

Activate One Step Update

I want to select the connection method used to download my transactions
Some banks offer enhanced Online Bill Pay and other services based on the connection method used to download your transactions. Choose this option if you are following specific instructions from your bank, or if you simply want to learn more. Note: Pre-registration for services and fees may be required.

Enter the name of your financial institution

I want to enter my transactions manually
Choose this option if your bank was not found in Simple Setup, or if you prefer to enter transactions into your Quicken registers by hand.

11. After you have selected **VeraBank**, click the “Next” button
12. Choose the radial button next to Direct Connect and click the “Next” button

Select Connection Method

Express Web Connect
- Automatically updates balances and transactions in Quicken by connecting to your bank.

Direct Connect (Fees may apply)
- Automatically updates balances and transactions in Quicken by connecting to your bank.
- Pay your bills and transfer money directly from Quicken (services vary by bank).
- Service may require separate activation. Contact Citizens National Bank TX for more details.

Web Connect
- Manually import balances and transactions into Quicken by downloading a file from your bank website.

13. Enter your DirectConnect login
 - User ID = your Social Security Number without dashes
 - Password = 6 to 8 character password established when you registered for Direct Connect
14. Quicken will then present a list of your Citizens National Bank accounts. Here you can link any existing VeraBank accounts that you have already added into Quicken or choose to add them now. After you have linked your account(s), click the “Next” button.
15. Quicken will process the accounts and show a screen once complete; click the “Finish” button.