Direct Connect and Express Web Connect Transition Instructions for Quicken Windows

Please follow the instructions below to reconnect your accounts to Business Online Banking following the transition on March 20, 2023.

For Direct Connect, you will need new Direct Connect login credentials. These credentials will be sent to you via email within 10 days of the transition. If you have not received them by June 3, 2023, please contact the Transition Support Line at 833-961-3614.

Complete on March 17, 2023 by 5:00 p.m. PT:

1. Back up your Quicken Windows Data File. Go to **File > Backup and Restore > Backup Quicken File**.
2. Download the latest Quicken Update. Go to **Help > Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

Complete on or after March 20, 2023:

1. Deactivate online banking connection for accounts connected to Columbia Bank.
    a. Choose **Tools > Account List**.
    b. Click **Edit** on the account to deactivate.
    c. In Account Details, click **Online Services**.
    d. Click **Deactivate**. Follow prompts to confirm deactivation.
    e. Click the **General** tab.
    f. Delete Financial Institution and Account Number information. Click **OK** to close window.
    g. Repeat steps for any additional accounts that apply.
2. Reconnect the online banking connection for your accounts.
    a. Choose **Tools > Account List**.
    b. Click **Edit** on the account you want to activate.
    c. In Account Details, click **Online Services** and then choose **Set up Now**.
    d. Type **Umpqua-Business Direct Connect** in the search field and click **Next.**
    e. Enter your credentials.
        - **Express Web Connect** uses the same credentials as your Umpqua Business Online Banking credentials.
        - **Direct Connect** requires separate login credentials which will be provided to you by email within 10 days of the transition on March 20, 2023.

    Important: If your credentials do not work, contact the Transition Support Line at 833-961-3614.

    f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu.

    Important: Do NOT choose "Create a new account" unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, choose **Ignore – Don't Download into Quicken** or click **Cancel**.

    g. After all accounts have been matched, click **Next** and then **Done**.