Exchange Bank & Trust supports technology that allows consumers to download current EBT account information into Quicken® Personal Finance Software using one of two different options. (Commercial QuickBooks are NOT supported)

There are no charges or fees associated with the use of the connectivity between Exchange Bank & Trust and the Quicken® product. The current version (2017) and previous two versions (2015-2016) of Quicken® are supported in this technology change. The name of the financial institution for use within Quicken® is Exchange Bank & Trust.

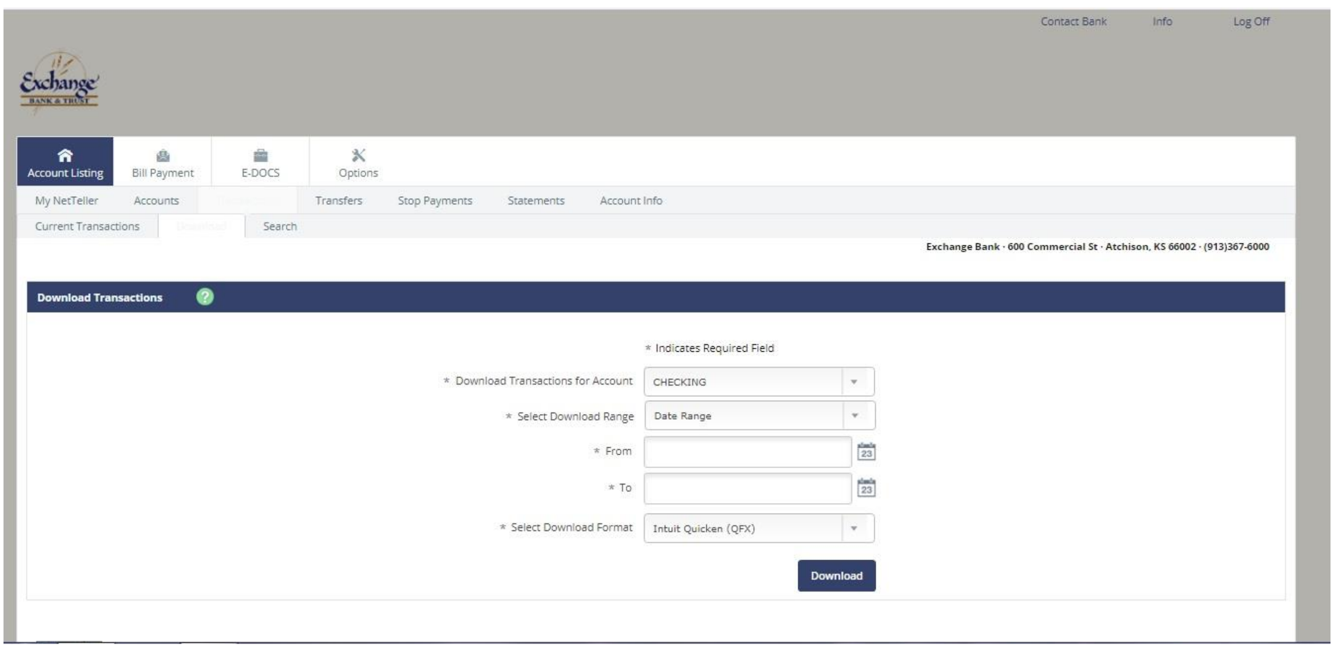
The customer should be able to export EBT transactions via the **export** through Open Financial Exchange (QFX) or utilize the **Express Web Connect** for Quicken®'s One Step Update feature (depending upon Quicken® software version).

OPTION 1: Download from EBT Online banking using QFX option.

To download from Online banking using the QFX Option, the customer should sign into Online banking as normal.

Select Account for download.

When **Download Transaction Screen** appears, select Download Range and Download Format as Intuit Quicken® (QFX). Complete the transaction by choosing **SUBMIT**.



OPTION 2: Use Express Web Connect

Exchange Bank & Trust now offers Web Connect to download account information into Quicken®. Advantages to the client include:

- ***No manual data entry*** - Once set up, all transactions can be downloaded right into Quicken®—instead of typing them in by hand.

- ***Automatically reconcile data*** - Web Connect data includes complete transaction and balance information to make categorization and account reconciliation easy.

- ***No duplicate transactions*** - Web Connect incorporates a special transaction-matching algorithm that prevents the download of duplicate transactions.

- ***Easier to use*** - Web Connect files may be automatically opened by Quicken® directly from the Exchange Bank & Trust web site, which eliminates the need to search for files that have been downloaded.

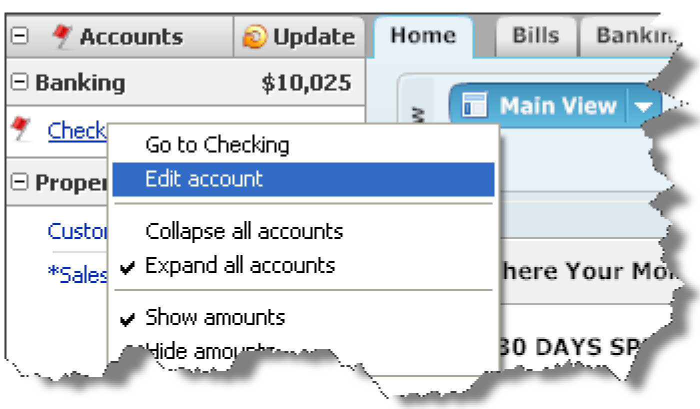
- ***Automatic account setup*** - Initiate a download to Quicken® from the Exchange Bank & Trust website, and Quicken® sets up your accounts for you—with your data already up to date.

What a client needs to get started:

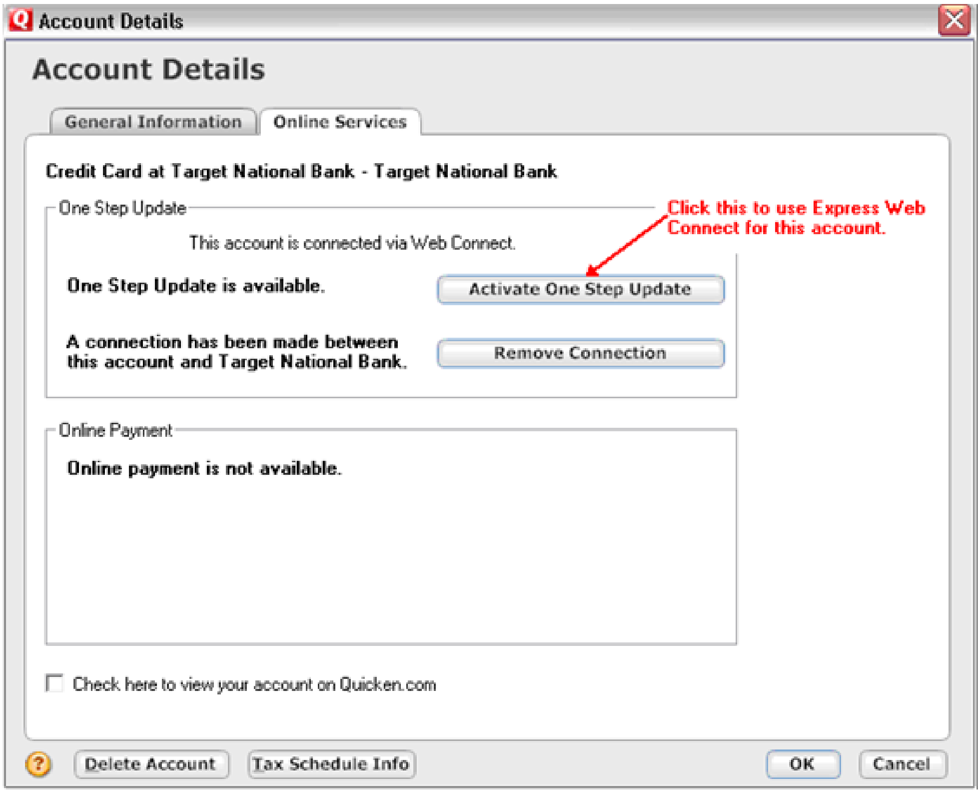
First, they will need a Customer ID and Password. With Web Connect, the Customer ID and Password are the same as the ones used to login to the Exchange Bank & Trust Website.

To enable an account within Quicken® for Express Web Connect and use One Step Update:

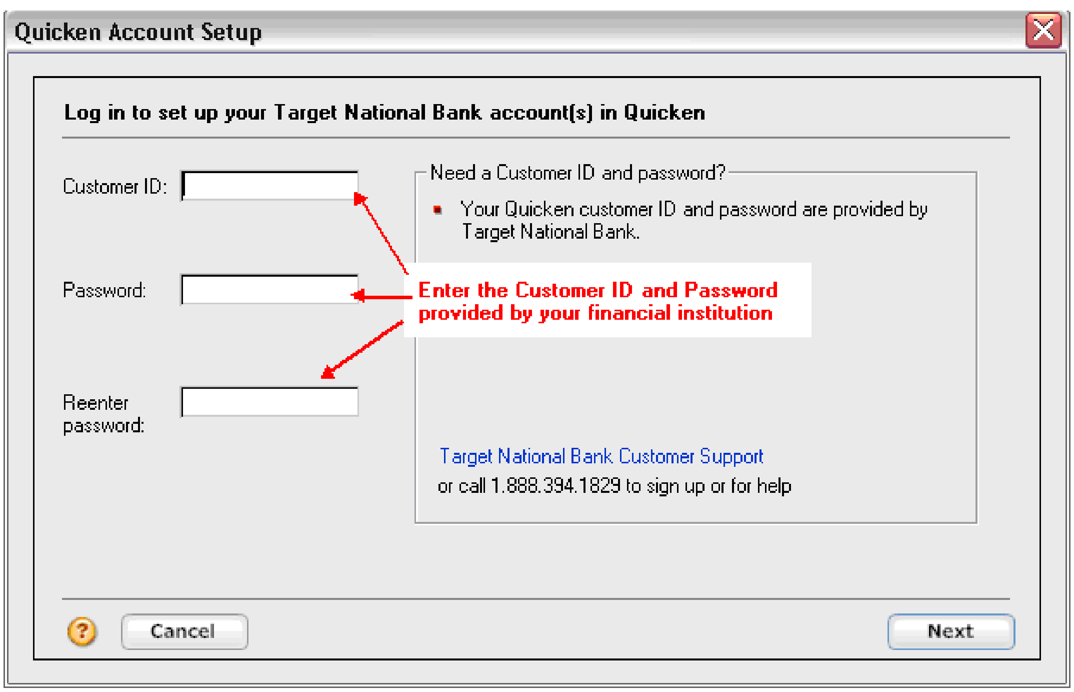
1. In the **Account list**, right-click the desired account and select **Edit Account**.



2. When the Accounts Details window opens, click the **Online Services** tab.
3. In the **One Step Update** section, click the **Activate One Step Update** button. This enables the account.



4. When the Quicken® Account Setup window appears, enter the **Customer ID** and **Password** you use with your financial institution, and then click **Next**.



The account is now set up to obtain any new transactions from Exchange Bank & Trust using Express Web Connect.

8-5-2017