

Quicken Direct & Express Web Connect Users

Disconnect & Reconnect for Windows

Disconnect Steps

1. Choose **Tools > Account List**
2. Click **Edit** on the account to deactivate
3. In **Account Details**, click **Online Services**
4. Click **Deactivate**, then follow the prompts to confirm deactivation
5. Click the **General** tab
6. Delete **Roscoe Bank** and **Account Number** information, then click **OK**
7. Repeat the steps for any additional accounts that apply

Reconnect Steps

1. Choose **Tools > Account List**
2. Click **Edit** on the account you want to activate
3. In **Account Details**, click **Online Services**, then choose **Set Up Now**
4. Type **Roscoe** in the search field and click **Next**
5. Enter your **Roscoe** credentials
 - Express Web Connect uses the same credentials as your Roscoe online banking login
 - Direct Connect might require credentials that do not match your Roscoe online banking login

Important: If your credentials do not work, contact us at xx-xxx-xxxx.

6. Ensure you associate the accounts with 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**.

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

Disconnect & Reconnect for Mac

1. Click your account in the **Accounts** list on the left side
2. Choose **Accounts > Settings**
3. Select **Set up transaction download**
4. Enter your financial institution name in the search field, select the correct option, and click **Continue**
5. Enter your **Roscoe** credentials
 - Express Web Connect uses the same credentials as your Roscoe online banking login
 - Direct Connect might require credentials that do not match your online banking login

Important: If your credentials do not work, contact us at xxx-xxx-xxxx.
6. In the **Accounts Found** screen, ensure you associate each new account to the appropriate account already listed in Quicken; under **Action**, choose **Link** to pick your existing account

Important: Do not select "ADD" in the Action column unless you intend to add a new account to Quicken.
7. Click **Finish**