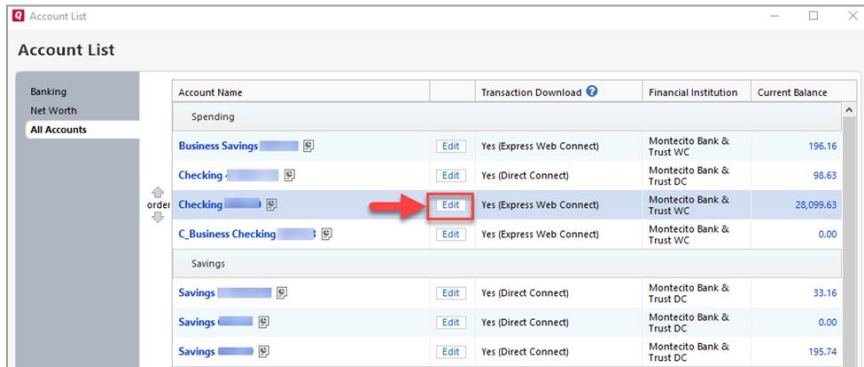




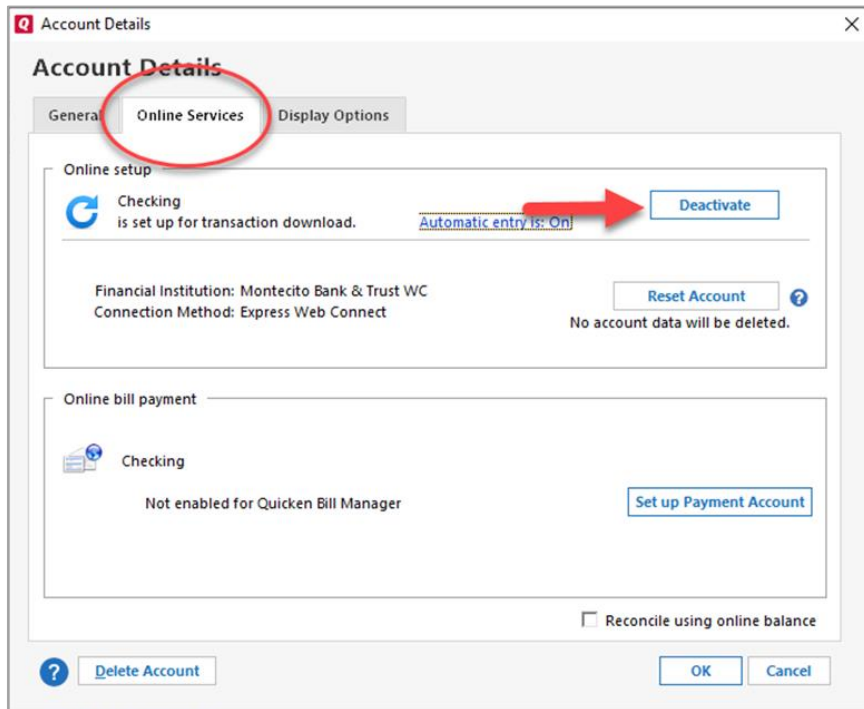
## Windows Quicken Reconnection Guide

Please follow the following steps to reconnect your MB&T online services in Quicken.

1. Navigate to **Tools**, then **Account List**. Click **Edit** on any account that you need to reconnect.



2. Click on the **Online Services** tab and click **Deactivate**.



3. Click on the **General** tab. Remove the **Financial Institution** information and click **OK**.

Account Details

Account Details

General Online Services Display Options

Account name: Checking Financial institution: Montecito Bank & Trust

Description: Account Number:

Account type: Checking

Tax deferred:  Yes  No

Interest rate: %

Set up alerts:

Max. Balance: Min. Balance:

Contact name: Phone: Home page: Bank Web page Go Activity page: Activity Web page Go Other page: Other Web page Go

Comments:

Delete Montecito Bank & Trust from this field before clicking OK.

Delete Account OK Cancel

4. Return to the **Online Services** tab and click **Set Up Now**.

Account Details

Account Details

General Online Services Display Options

Online setup

Download transactions directly from your financial institution. Set up Now...

Online bill payment

C\_Business Checking XX Not enabled for Quicken Bill Manager Set up Payment Account

Delete Account OK Cancel

5. Search for **“Montecito Bank & Trust.”** You should see both these options listed. Choose the connection option you prefer.

Montecito Bank & Trust Web Connect = Montecito Bank & Trust WC

Montecito Bank & Trust Direct Connect = Montecito Bank & Trust DC



**Note:** If you have a Ready Cash Reserve with MB&T, choose Montecito Bank & Trust WC.

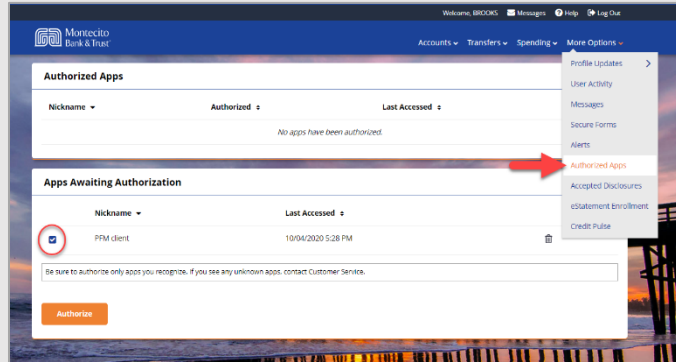
6. Enter your MB&T Online Banking credentials and click **Connect**.

**\*\*\*Montecito Bank and Trust DC Only\*\*\***

Direct Connect has to be authorized by you in Online Banking before Quicken can be linked. **The first time you try to connect with your Online Banking credentials, you will receive a connection error – this is expected. A request for authentication will be sent to your Online Banking account.**

To authorize:

1. Go to **montecito.bank** and log into Online Banking with your credentials.
2. In Online Banking, go to **More Options > Authorized Apps**.
3. Check **PFM Client**, and then click **Authorize**.

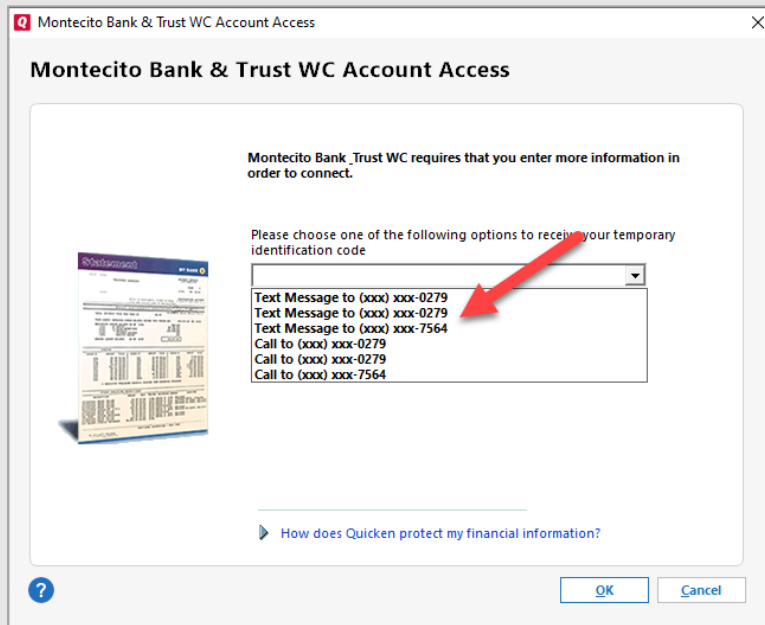


Once the authorization is complete, you can return to Quicken and try connecting again.

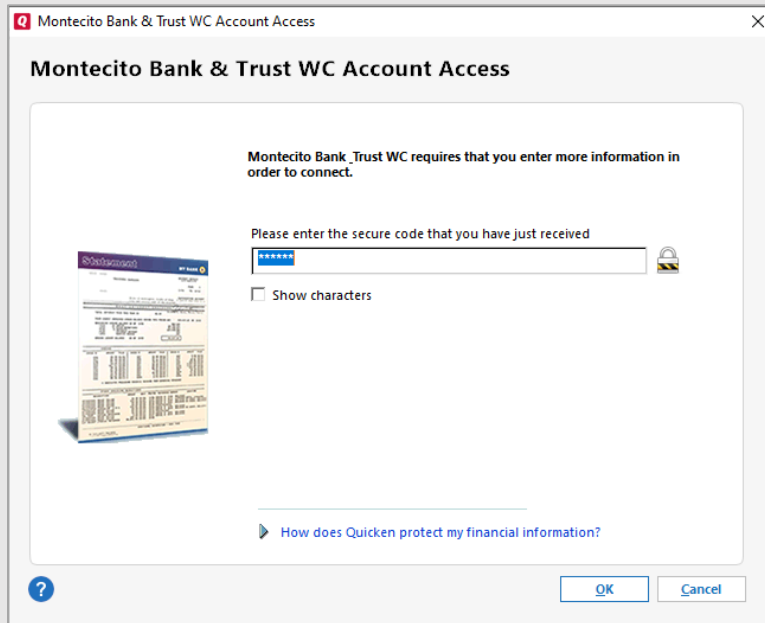
*See next page for WC only.*

**\*\*\*Montecito Bank and Trust WC Only\*\*\***

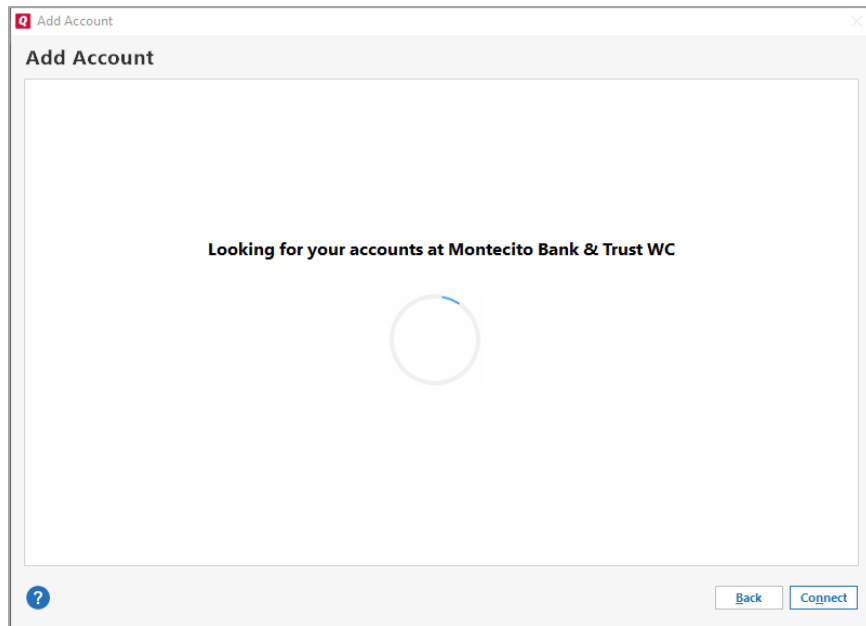
1. Choose a number to receive a confirmation by text or automated call.



2. Enter the onetime code sent by text or automated call.



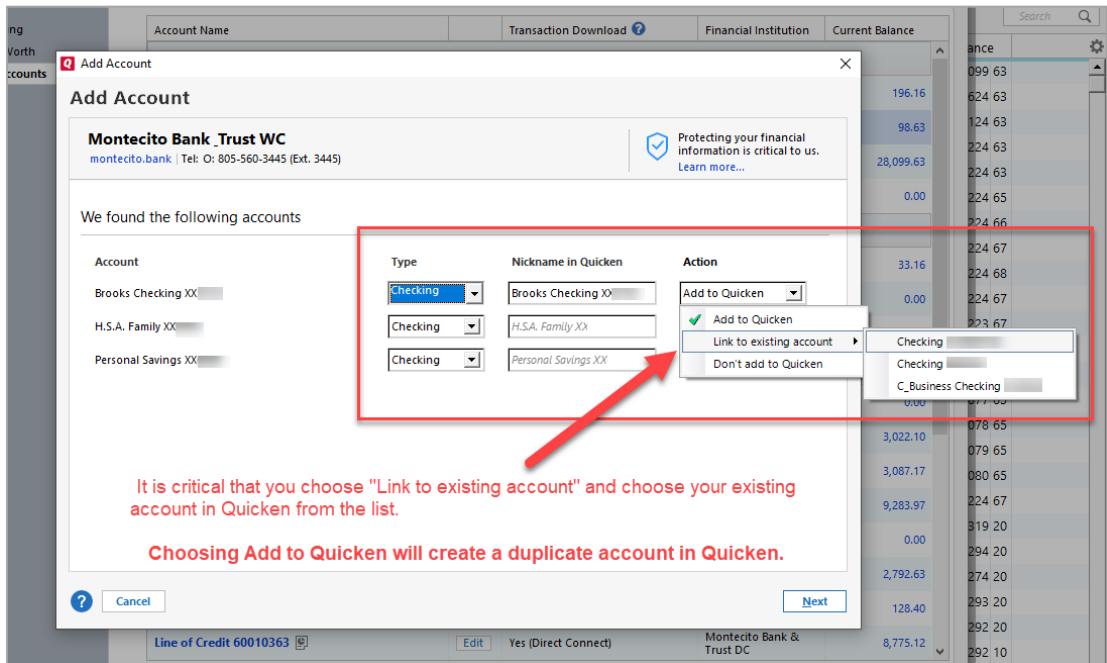
7. Quicken will connect to Montecito Bank & Trust. This could take several minutes.



8. Link your existing Quicken account to the accounts found in MB&T Online Banking.



**Note:** It is critical that you choose "Link to existing account" from the dropdown.



9. A confirmation will display when the connection is complete.

