Quicken® Instructions

Generate Direct Connect Client UID

It is best practice to always check your Client UID in Online Banking prior to connecting to Quicken®.

1. Sign into Online Banking at RCBbank.bank or the RCB Bank Mobile Banking App.
2. Click on Settings in the main menu.
3. Click on Direct Connect Registration

If there is already a Client UID listed, the security link is already in place and you can proceed to Quicken®.

If there is no Client UID listed:

1. Click Generate.
2. You will see a message saying "A new Client UID registration window was generated."
3. Within 15 minutes, sign into Quicken® and refresh the connection with RCB Bank. (If you are unsure how to do this, please contact Quicken®)
4. At this point, the security connection has been made. You can come back to this page to see your Client UID.

Update your online accounts

1. Use One Step Update on your account bar to easily update all of your Online accounts.
2. You can also trigger a One Step Update using Tools menu → One Step Update. You may need to Enter Vault Password.
3. You will see a progress screen while Quicken® contacts your financial institutions and downloads your transaction data.
4. Once the update is completed, you will see the One Step Update Summary. You may see an item that needs your attention. Click the question mark by the entry for information about resolving the problem.

What is One Step Update?

One Step Update is a single access point for almost all connected services; you can update transactions and send online payment instructions for multiple accounts, sync your data to the Quicken® Cloud and use Quicken® on your phone or tablet to download security quotes, export some of your Quicken® account information to Investing. Quicken.com, and obtain product updates for your Quicken® software.

One Step Update is the centralized access point for almost all connected services in Quicken®. It makes it easy to:

- Download the latest cleared transactions and balances for all your online-enabled bank, investment, 401(k), and credit card accounts.
- Send or cancel online payments (not supported by all financial institutions).
- Transfer money between accounts at the same financial institution, if you are connected via Direct Connect.
- Sync your data to the Quicken® Cloud and use Quicken® on your phone or tablet.
- Download security quotes, download currency exchange rates, export some of your Quicken® account information to Quicken.com, and obtain product updates for your Quicken® software.

You can set up Quicken® to automatically download transitions at the beginning of a session. Go to Edit menu → Preferences → Startup. Select Download transactions when Quicken® starts and click OK.

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How do I enable an account for One Step Update?

One Step Update is automatically applied to Direct Connect accounts. However, it is possible to turn One Step Update off or on for an account.

To turn One Step Update on or off for an account:

1. Use One Step Update on your account bar to easily update all of your Online accounts. You can also trigger a One Step Update using Tools menu → One Step Update. You may need to Enter Vault Password.

2. The One Step Update Settings screen will appear. Each account has a check box next to it. To turn on One Step Update for an account, click the check box to add a checkmark. To turn One Step Update off for an account, click the check box to remove the check mark.

3. Click Apply.

Visit Official Quicken® Support - Phone, Chat, or Community for additional assistance.

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