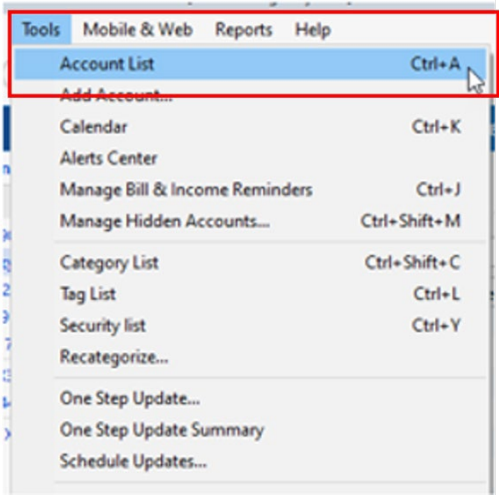

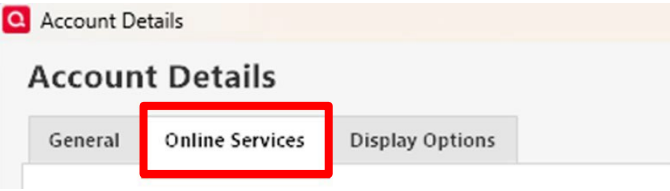



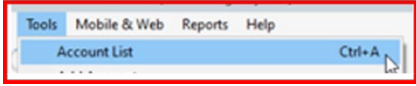

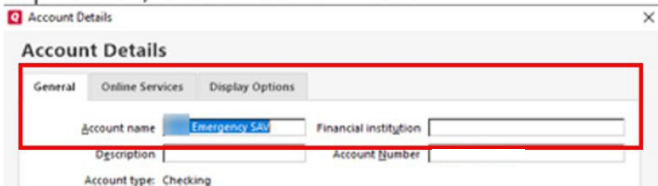
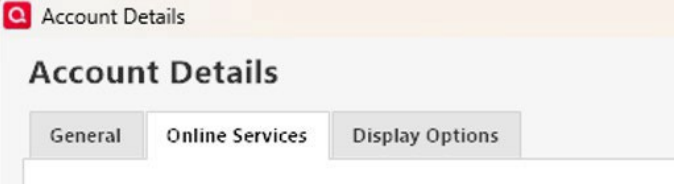
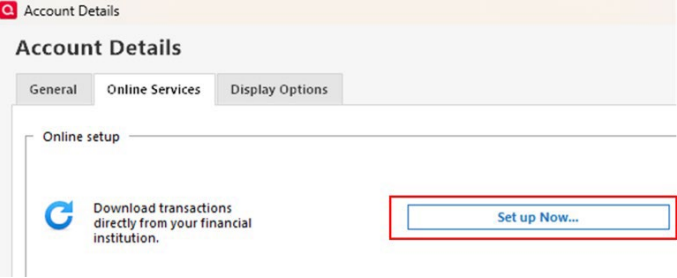
Quicken Desktop Deactivate & Reactivate Guide

Follow the steps in this guide Deactivate and Reactivate your Truist accounts within Quicken. Please scroll down to follow QuickBooks instructions.

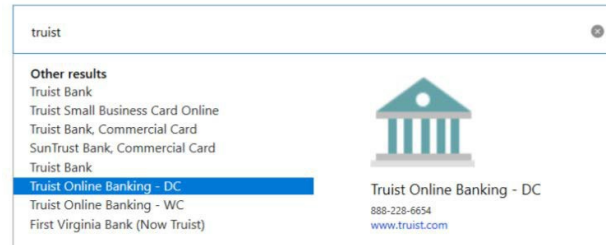
Quicken Desktop Deactivate

<p>Step 1: Open Quicken.</p>	
<p>Step 2: From the top navigation, hover over Tools then select Account List.</p>	
<p>Step 3: From your Account List, select the Edit button next to your Truist account(s).</p>	
<p>Step 4: Within the Account Details pop up, select the Online Services tab.</p>	
<p>Step 5: Select Deactivate.</p>	
<p>Step 6: Repeat steps 2-5 for all remaining Truist accounts.</p>	

Quicken Desktop Reactivate

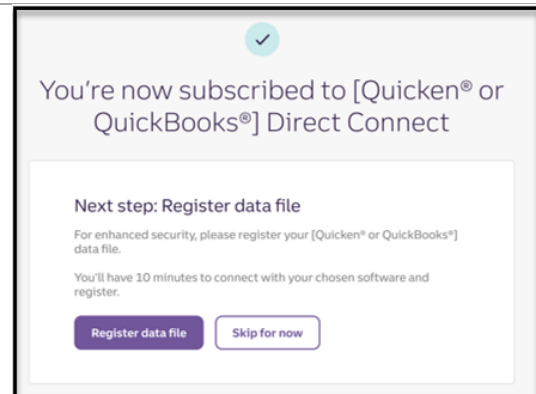
<p>Step 1: From the top navigation, hover over Tools then select Account List.</p>	
<p>Step 2: From your Account List, select the Edit button next to your Truist account.</p>	
<p>Step 3: In the Account Details pop up, on the General tab, make sure the Financial Institution box is blank. Delete any pre-populated information.</p>	
<p>Step 4: Within the Account Details page, select the Online Services tab.</p>	
<p>Step 5: Select Set up Now...</p>	

Step 6: Enter **Truist** in the search bar. Select **Truist Online Banking - DC**, then select **Next**.

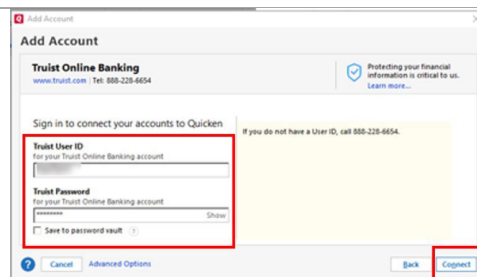


Step 7: In a new browser, login to Truist Mobile & Online Banking.

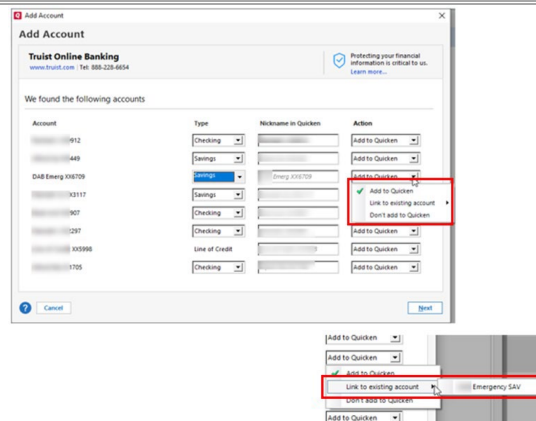
- Select Profile in the top right-hand corner.
- Select Preferences from the Settings column.
- Click Subscribe or Manage in the Quicken and QuickBooks tiles.
- Select Register data file.
- Select Confirm registration.



Step 8: Return to Quicken and enter your Truist ID and Truist Password and select **Connect**. Quicken will connect to Truist and find all eligible accounts.

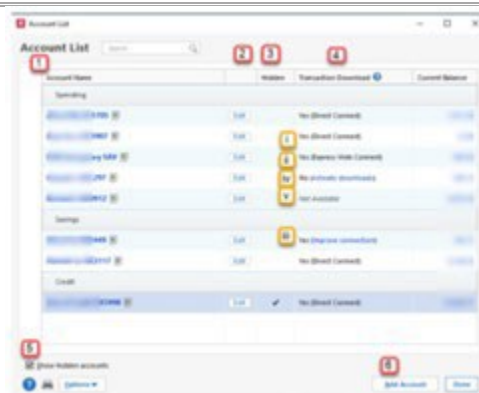


Step 9: Select the dropdown arrow, and hover over **Link to existing account** action next to each account. **Note:** Do not choose Add to Quicken as this will create duplicate accounts.



Step 10: Select Next in the bottom right-hand corner.

Step 11: You will see a listing of your Truist accounts. Simply select **Done** to close out the message.



If you have questions or need assistance, please contact us at 1-844-4TRUIST (1-844-487-8478) or Digital Support at 1-888-228-6654 and select option 3.

Wealth clients: If you have questions or need assistance, please contact the Wealth Solutions Center at 1-800-228-9671 8 am – 8 pm Mon-Fri, 8 am – 5 pm Sat.

QuickBooks Desktop Deactivate & Reactivate Guide

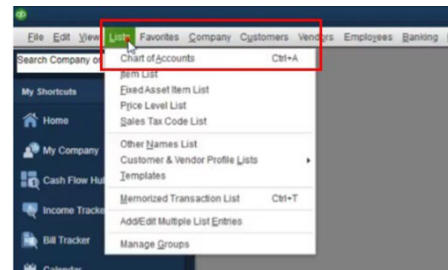
Follow the steps in this guide to Deactivate and Reactivate your Truist accounts within QuickBooks.

QuickBooks Desktop Deactivate

Step 1: Log into Quickbooks Desktop using your credentials.



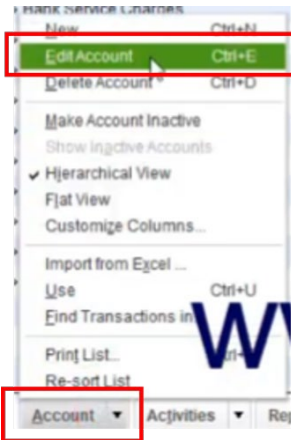
Step 2: From the top navigation, hover over **Lists** then select **Chart of Accounts**.



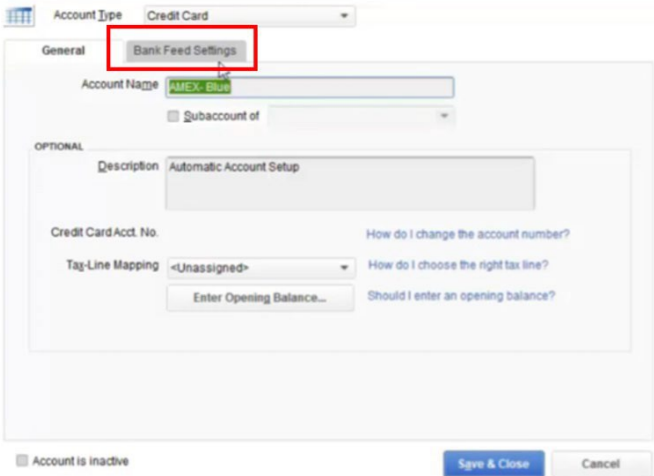
Step 3: Select your Truist account from the list to be disconnected.



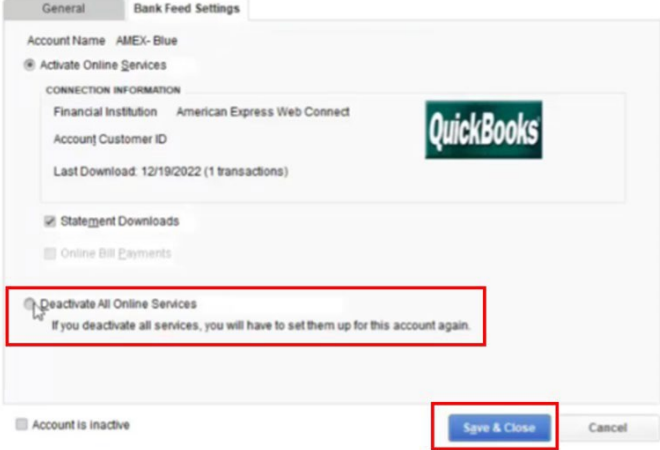
Step 4: Then select **Accounts** from the bottom left, then **Edit Account**.



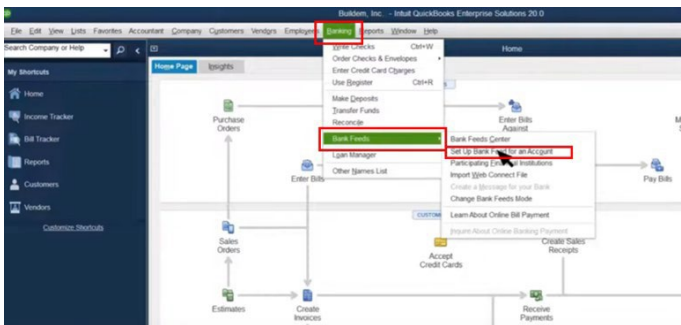


Step 5: Select **Bank Feed Settings**.



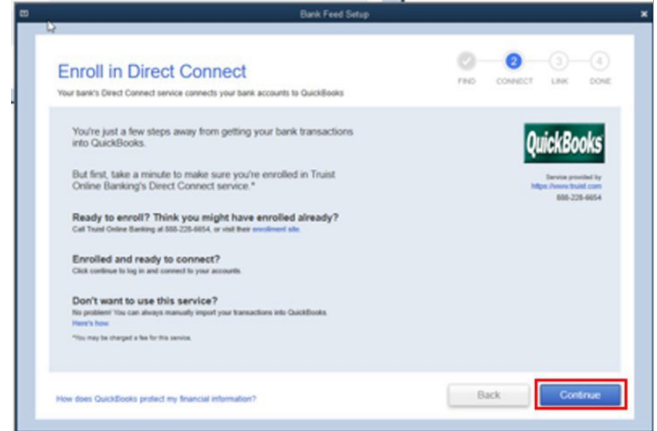


<p>Step 6: Select Deactivate All Online Services, then select Save & Close.</p> <p>Note: If it will not allow deactivation, make sure all downloaded transactions in the BANK FEEDS CENTER have been accepted (added to the register).</p>	
<p>Step 7: Repeat steps 2-6 for all remaining Truist accounts.</p>	

QuickBooks Desktop Reactivate

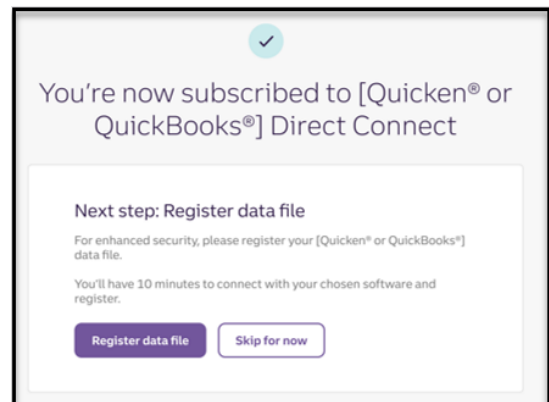
<p>Step 1: From your top navigation, hover over Banking, hover over Bank Feeds, and select Set up Bank Field for an Account.</p>	 A screenshot of the QuickBooks Desktop interface. The top navigation bar is visible with the 'Banking' menu highlighted. A sub-menu is open under 'Banking', showing 'Bank Feeds' highlighted. A red box highlights the 'Set up Bank Field for an Account' option in the sub-menu.
<p>Step 2: Type in Truist to the search bar.</p>	 A screenshot of the 'Step 1: Find your bank' screen. It shows a search bar with the placeholder text 'Enter your bank's name'. Below the search bar, there are examples: 'Bank of America, Citibank, American Express'. A mouse cursor is pointing at the search bar.
<p>Step 3: Select Truist Online Banking - DC.</p>	 A screenshot of the 'Matching Results' section. It shows a list of search results for 'Truist'. The results are: 'Truist Bank', 'Truist Bank EWC', 'Truist Bank, Commercial Card', 'Truist Digital Treasury', and 'Truist Online Banking - DC'. The 'Truist Online Banking - DC' option is highlighted.

Step 4: Select **Continue** within the Enroll in Direct Connect window.

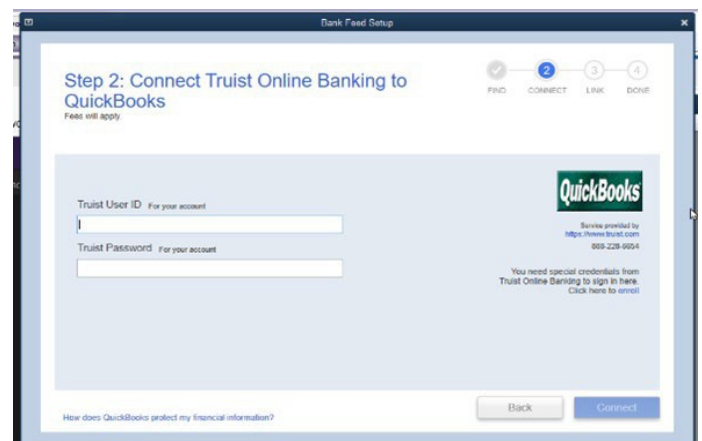


Step 5: In a new browser, login to Truist Mobile & Online Banking.

- Select Profile in the top right-hand corner.
- Select Preferences from the Settings column.
- Click Subscribe or Manage in the Quicken and QuickBooks tiles.
- Select Register data file.
- Select Confirm registration.



Step 6: Return to QuickBooks and enter your Truist User ID and Password and select **CONNECT**. QuickBooks will connect to Truist and find all eligible accounts not currently set up in QuickBooks.

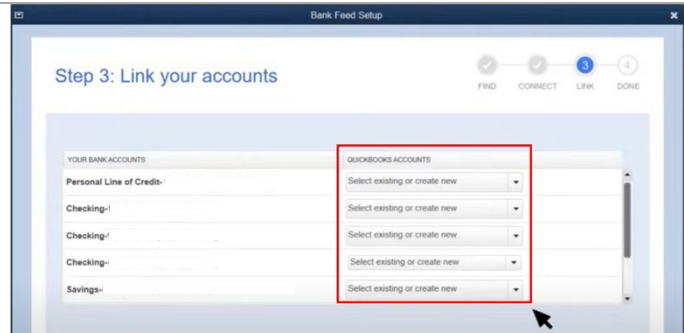


Step 7: The first column, YOUR BANK ACCOUNTS, identifies that accounts were found at Truist. Match the existing account to the account in the left-hand column. Select **Connect** in the bottom right-hand corner when done. **Note:** Do not select Create New, as this will create duplicate accounts listed.

All Truist accounts will populate in this list, please only match Truist accounts that are associated with a QuickBooks account.

*Only 80 accounts will populate in this screen. If you are missing accounts from this list, please restart the process to match remaining accounts.

Step 8: A success window should pop up and select close.



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