MINT USER ID UPDATE INSTRUCTIONS

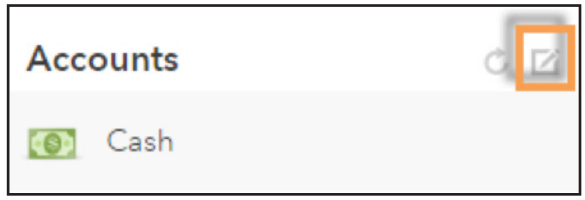
Introduction

Discover is simplifying the way its users log in to their online accounts. If a user has multiple Discover card and bank accounts, each of their User IDs and Passwords will now be combined into one convenient User ID and Password.

This change means you will need to update your Mint settings to ensure a smooth transition of your Discover account data.

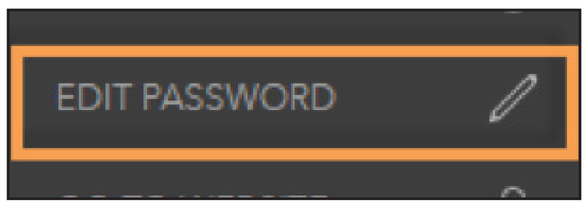
Documentation and Procedures

1. Log into Mint
2. Click the Edit button next to Accounts



3. Click on the Account you want to update first
4. Click on the Sprocket on the top right

5. Click Edit Password



6. Enter the new User ID and Password

7. Click Continue
8. Once you see the "Success" screen, click Close

9. Repeat steps 3 through 8 for all impacted accounts

Introduction

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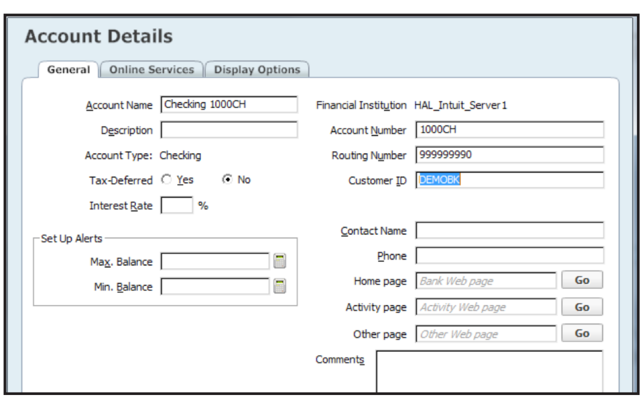
Documentation and Procedures

TASK #1: CONVERSION PREPARATION

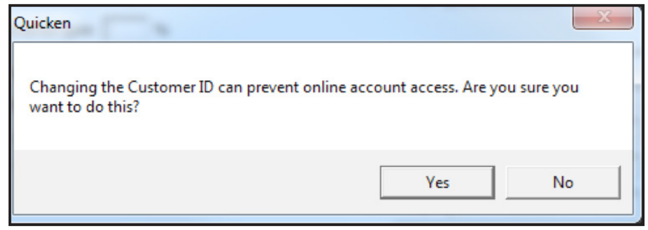
1. Backup your data file. For instructions to back up your data file, choose Help menu > Quicken Help. Search for Backup Data File and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose Help menu > Quicken Help. Search for Update Software and follow the instructions.

TASK #2: UPDATE YOUR ACCOUNT USER ID

1. Choose Tools menu > Account List.
2. Click the Edit button of the account you intend to update.
3. In the Account Details dialog
4. Click on the General tab.
5. Update Customer ID with the new one.
6. Click OK



7. Click Yes on the warning message that appears

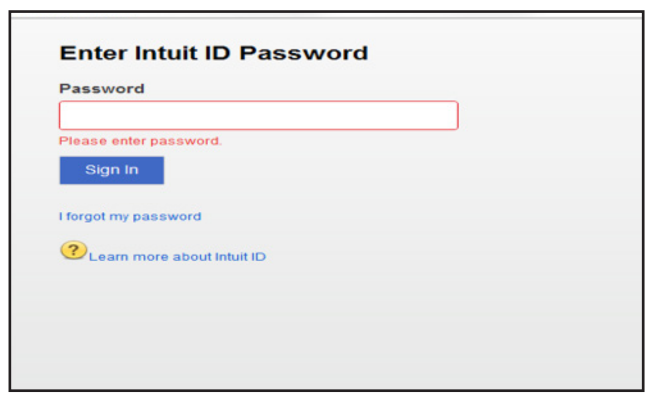


8. Click OK on the second message regarding passwords.

NOTE: 2015 and 2016 only. Does not appear in 2014

9. If prompted for "Intuit ID Password" please enter and click Sign In

IMPORTANT: Intuit ID Password is the password used to register the Quicken data file and not your Discover password.



10. Repeat steps for each account you are updating.

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Documentation and Procedures

TASK #1: CONVERSION PREPARATION

1. Backup your data file. For instruction to back up your data file, choose Help menu > Search. Search for Backing Up, select Backing up data files, and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose Help menu > Search. Search for Updates, select "Check for Updates," and follow the instructions.

TASK #2: DEACTIVATE YOUR ACCOUNTS

1. Select your account under the Accounts list on the left side.
2. Choose Accounts menu > Settings.
3. Select Troubleshooting > Deactivate Downloads.
4. Repeat steps for each account at Discover Bank/Card.

TASK #3: REACTIVATE YOUR ACCOUNT

NOTE: All transactions must be matched or added to the register prior to the deactivating of your account(s).

1. Select your account under the Accounts list on the left side.
2. Choose Accounts menu > Settings.
3. Select Set up transaction download.
4. Enter Discover Bank/Card in the Search field, select the institution name in the Results list and click Continue.
5. Enter your Direct Connect User Id and Password and click Continue.
6. If the bank requires extra information, enter it to continue.

NOTE: Select "Direct Connect" for the "Connection Type" if prompted.

7. In the "Accounts Found" screen, associate each new account to the appropriate account already listed in Quicken. Under the Action column, select "Link" to pick your existing account.

IMPORTANT: Do NOT select "ADD" under the action column unless you intend to add a new account to Quicken.

8. Select Finish.

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Documentation and Procedures

TASK #1: CONVERSION PREPARATION

1. Backup your data file. For instruction to back up your data file, choose Help menu > Search. Search for Backing Up, select "Backing up data files," and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose Help menu > Search. Search for Updates, select "Check for Updates," and follow the instructions.

TASK #2: DEACTIVATE YOUR ACCOUNT

1. Choose Lists menu > Accounts.
2. Select the account that you want to disable and click Edit.
3. Write down your account information (account number, routing number, and customer ID).

NOTE: You will need this information to re-enable your account.

4. If you use online payment services, then select Not Enabled in the Pay Bills Online drop-down list. Follow the prompts to confirm the deactivation.
5. In the Download Transactions drop-down list, select Not Enabled. Follow the prompts to confirm the deactivation.
6. Remove the information within the Account Number and Routing Number fields.
7. Click OK to save your edits.
8. Repeat steps 2 – 7 for each account at Discover Bank/Card.
9. Verify your account list does not display a blue online circle icon for any accounts at Discover Bank/Card.

TASK #3: REACTIVATE YOUR ACCOUNT

1. Choose Lists menu > Accounts.
2. Select your first disabled account and click Edit.
3. Click the Financial Institution drop-down list and select Change Financial Institution.
4. Click on Update List.
5. In the Financial Institutions dialog, select Discover Bank/Card from the list and click Use.
6. Enter your Direct Connect User ID and Password. Click OK.
7. In the Add Online Services dialog, match your first account to the appropriate account number. Click OK.

NOTE: Each account will be displayed below "Use an existing account."

8. Click OK.
9. Click OK to close the Edit Register page.
10. Choose Lists menu > Accounts. Verify that each account you are reactivating has a blue online circle for online services.

Introduction

Discover is simplifying the way its users log in to their online accounts. If a user has multiple Discover card and bank accounts, each of their User IDs and Passwords will now be combined into one convenient User ID and Password.

This change means you will need to update your QuickBooks settings to ensure a smooth transition of your Discover account data.

Documentation and Procedures

TASK #1: PREPARATION

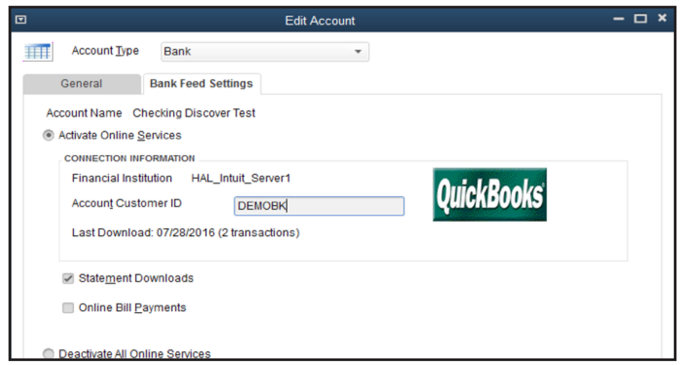
1. Make sure you have your User ID for your Discover
2. Backup your data file. For instructions to back up your data file, choose Help menu > QuickBooks Help. Search for Back Up and follow the instructions.
3. Download the latest QuickBooks update. For instructions to download an update, choose Help menu > QuickBooks Help. Search for Update QuickBooks, then select Update QuickBooks and follow the instructions.

IMPORTANT: If multiple computers do not use the same QuickBooks data file, skip step 3. QuickBooks activities such as Online Banking cannot be performed in multi-user mode because of the way the activities interact with a company data file.

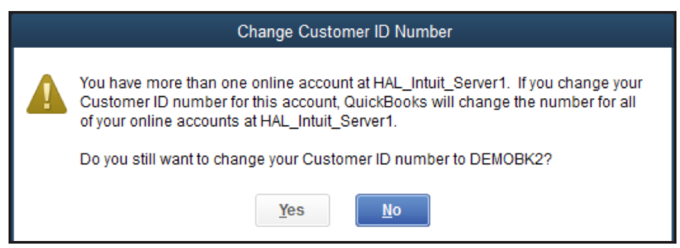
4. Switch to single user mode. For instructions to switch to single user mode, choose Help menu > QuickBooks Help. Search for Switch to Single User Mode and follow the instructions.

TASK #2: UPDATE YOUR DISCOVER ACCOUNT ID

1. Choose Lists menu > Chart of Accounts.
2. Select the account you want to update.
3. Choose Edit menu > Edit Account.
4. Click on the Bank Feed Settings tab in the Edit Account window.
5. Update "Account Customer ID" and click Save & Close.



NOTE: If you have more than one account attached to the same Branding presence (i.e. Discover Bank) you will see a message warning all accounts attached to this presence will be updated. You will need to click Yes to make the change.



6. Click Save & Close.
7. Repeat steps 2 – 7 for each account that was not updated in step 6.

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This change means you will need to update your QuickBooks settings to ensure a smooth transition of your Discover account data.

Documentation and Procedures

TASK #1: CONVERSION PREPARATION

1. Backup your data file. For instructions to back up your data file, choose Help menu and use the Search bar available at the top. Search for Back Up and follow the instructions on screen. The first time you do a backup, QuickBooks will guide you through setting backup preferences.

2. Download the latest QuickBooks Update. For instructions to download an update, choose Help menu and use the Search bar available at the top. Search for Update QuickBooks, select Check for QuickBooks Updates and follow the instructions.

TASK #2: MATCH DOWNLOADED TRANSACTIONS

If new transactions were received from your connection, accept all new transactions into the appropriate registers.

If you need assistance matching transactions, choose the Help menu and use the Search bar available at the top. Search for Updating Your Register, select the article with that name and follow the instructions.

TASK #3: DEACTIVATE YOUR ACCOUNTS

NOTE: All transactions must be matched or added to the register prior to the deactivating of your account(s).

1. Choose Lists menu > Chart of Accounts.
2. Select the account you want to deactivate.
3. Choose Edit menu > Edit Account.
4. In the Edit Account window, click the Online Settings button.
5. In the Online Account Information window, choose Not Enabled from the Download Transactions list and click Save.
6. Click OK for any dialog boxes that may appear with the deactivation.
7. Repeat steps 2 – 6 for each account at Discover Bank/Card.

TASK #4: REACTIVATE YOUR ACCOUNT

1. Choose Banking menu > Online Banking Setup.
2. Select Discover Bank/Card from the Financial Institution list and click Next.
3. Follow the instructions in the wizard. If prompted for connectivity type, select Direct Connect.
4. The Online Banking Assistant window displays during setup. Select Yes, my account has been activated for QuickBooks online services, then click Next.
5. Enter credentials and click Sign In.
6. For each account you wish to download into QuickBooks, click Select an Account to connect to the appropriate existing account register.

IMPORTANT: Do NOT select "New" under the action column.

7. Click Next.
8. Click Done.