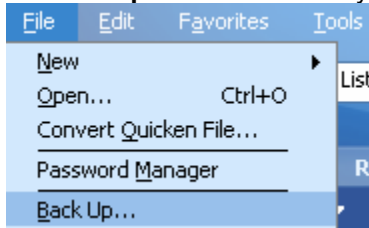
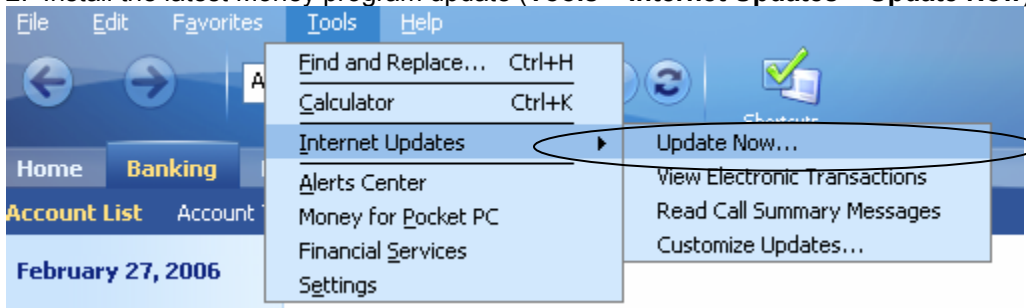


This document will help you set up Microsoft Money® Direct Connect to work with our new system. You must first deactivate your current set-up and establish a new connection.

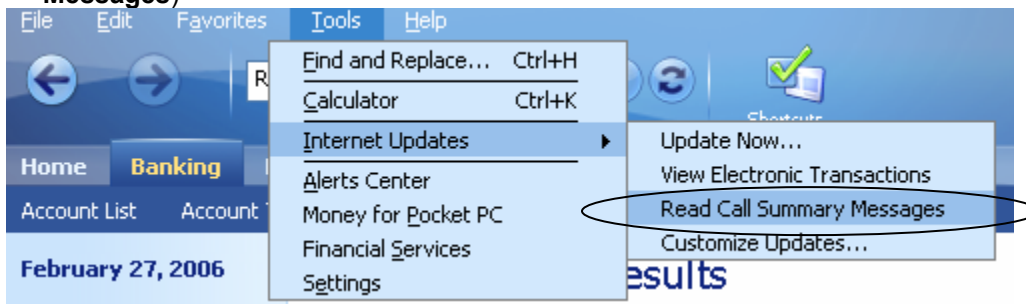
1. **Back up** the current Money Data (File – Backup)



2. Install the latest Money program update (Tools – Internet Updates – Update Now)



3. Once the update has been applied, update the online services (Tools – Internet Updates – Read Call Summary Messages)



4. Click the “**Click here**” link to update the Online Services **Note:** If you do not see this link, click the **Update Now** button

Review update results

The screenshot shows the 'Review update results' page. It has a blue header with a green arrow icon and the text 'Quotes, News, and Exchange Rates'. Below this, there is a checkmark icon and the text 'Your call was successful: 2/27/2006 9:08 AM'. Below that, there is a house icon and the text 'Account Transactions' and 'Wings Financial FCU'. Below this, there is a checkmark icon and the text 'Your call was successful: 8/9/2005 11:15 AM'. Below that, there is a yellow star icon and the text 'Your provider has updated their service offerings. Click here to update your Online Services.' The 'Click here' link is circled.

- Click the **Accept** button to **update online services for Wings Financial FCU**
- Open an Internet browser and access the Online Services Registration enrollment form:
<https://www.wffcuonline.com/onlineserv/OFX/OFXRegister.cgi>
- Existing Users** – Type in your **Wings ID#** and **password** and click the **Register** button
New Users – Click **Sign up**

| Registration for Direct Connect | New to Wings Financial Federal Credit Union |
|---|---|
| <p>Enter your Wings Financial Federal Credit Union CU Online Wings ID# and Password below, then click on Register!</p> <hr/> <p>User Information</p> <p>Wings ID# <input type="text"/></p> <p>Password: <input type="password"/></p> <div style="border: 1px solid black; padding: 5px; width: fit-content;"> <p>Note: Password is the same as CU Online</p> </div> <p style="text-align: right;"><input type="button" value="Register"/></p> | <p>If you are not yet enrolled in Wings Financial Federal Credit Union's Internet Banking, click here to join!</p> <p style="text-align: right;"><input type="button" value="Sign up"/></p> |

- Existing User** – Read the disclosure and click the appropriate button



Online Banking Agreement

9. Complete the **Direct Connect Registration Form** and click **Submit Enrollment**. Return to **Money**

Direct Connect Registration Form

Please enter your personal information below. Once your application is approved you may access your financial data from your favorite personal finance manager.

| | | |
|------------------|---|-------------------|
| Name: * | <input type="text" value="Mr. Normal"/> | ? |
| Address: * | <input type="text" value="123 Main Street"/> | ? |
| Address1: | <input type="text" value="Apt. 34 behind the house"/> | ? |
| City: * | <input type="text" value="Anytown"/> | |
| State: * | <input type="text" value="California"/> | |
| Zip: * | <input type="text" value="93010"/> | ? |
| Phone Number: * | <input type="text" value="(805) 555-1212"/> | |
| Email Address: * | <input type="text"/> | ? |

Enter and confirm the password you wish to use to access your accounts. It is suggested that you use a different password than you use for CU Online. Your password must be between 6 and 8 alpha numeric characters. Please make a note of your password and place it in a safe location.

| | | | |
|---|-------------------|----------------------|-------------------|
| Note: Password must be different than CU Online Password | Password* | <input type="text"/> | ? |
| | Confirm Password* | <input type="text"/> | ? |

* Required Fields, [?](#) = Help

Submit Enrollment

10. Click **set up online services with Wings Financial FCU**

Update online services for Wings Financial FCU

Wings Financial FCU has updated your online services. To complete the upgrade, set up the new services.

[Set up online services with Wings Financial FCU](#)

11. Choose **Banking** and click **Next**

Choose an account type

Banking

Credit card

Investment

Other account type (such as loan, asset, or watch accounts)

Next Cancel

12. Select **Wings Financial FCU** and click **Next**

Select a bank or brokerage

Click the first letter of your bank's or brokerage's name, and then select the name from the list.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

W

- Whatcom Educational CU
- Wheaton Bank & Trust
- Whidbey Island Bank
- Whitaker Bank
- Wilber National Bank
- Williamstown Savings Bank
- Willow Grove Bank
- Wilmington Trust
- WilServ Credit Union
- Wilshire State Bank
- Wilson & Muir Bank and Trust Company
- Wilson Bank
- Winchester Savings Bank
- Windward Community FCU
- Wings Financial FCU

My bank or brokerage isn't listed

Back Next Cancel

13. Select **Yes, I have special sign-in information for use with Money** and click **Next**
Do you already have sign-in information?

To update your accounts online, Money needs your Account # and PIN. If you don't want online updates, you can [update your accounts manually](#) by typing in transactions.

No, I don't have sign-in information for Wings Financial FCU.

Yes, I have sign-in information for the Wings Financial FCU website, but I don't have special sign-in information for use with Money.

Yes, I have special sign-in information for use with Money.
Select this option if you've already signed up directly with Wings Financial FCU to provide account updates (also called OFX services) to Money.

14. Type in **Wings ID#** and **Direct Connect Password** that was setup on the registration form. Click **Next**

Enter your bank or brokerage sign-in information

To set up automatic updates, enter the sign-in information you received from Wings Financial FCU when you signed up to use Money online services with Wings Financial FCU.

Account #:

PIN:

Your PIN must be 4 to 8 characters long.

Remember this password

[View the Microsoft Money Privacy Statement](#)

15. Choose the appropriate account update settings and click **Next**
Choose account update settings


Decide how much historical information Money should retrieve from your bank, and how often you want your accounts automatically updated.

How many days of past transaction information do you want to include for your accounts?

Include: Last 60 days Don't include my previous transactions

- Your bank or brokerage may limit how many months of transactions are available online.
- If your account has a lot of transactions, choose a short time period (such as 90 days). Otherwise, your bank may not be able to download your data.

After my account is set up, automatically update my information:

Every day  Money cannot automatically update your account because Money isn't set to remember your password.

16. Account data will download into Money

