Quicken Conversion Instructions

Quicken Mac Web Connect

Instructions for downloading a Web Connect File from Online Banking

On or After Tuesday, December 8: Connect Your Accounts

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter the Bank's name in the search field, select the correct option and click **Continue**.
5. Log into Online Banking site and download your transactions to your computer.
   Important: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.
6. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web Connect** for the "Connection Type" if prompted
7. In the **Accounts Found** screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, click **Link** to pick your existing account. **IMPORTANT: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.**
8. Click **Finish**.