

Quicken for Mac Conversion Instructions



Web Connect

Introduction

As **Winchester Savings Bank** completes its system upgrade, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your login credentials for online banking.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. Go to **File > Save a Backup**
2. Download the latest Quicken Update. Go to **Quicken > Check for Updates**

Task 2: Connect Accounts at **Winchester Savings Bank** on or after **10/7/2019**

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 **Winchester Savings Bank** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Log in to Online Banking at www.winchestersavings.com. **Download** a file of your transactions to your computer.

NOTE: 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 **Drop download file**.

NOTE: Select "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, 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. Click **Finish**.
9. Repeat steps for each account to be connected.