

Quicken for Mac Conversion Instructions



Web Connect

Introduction

Astoria Bank accounts are moving to **Sterling National Bank Personal**, 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 User ID and Password for Online Banking with Bill pay and Sterling**Connect**.

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.

Documentation and Procedures

Task 1: Conversion Preparation on or before **08/10/18**

1. Backup your data file. For instructions 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: Connect Accounts at *Sterling National Bank Personal* on or after **8/13/18**

1. You must log into SterlingConnect at <https://sterlingconnect.com> and access Personal Online Banking from the Applications menu at least once prior to completing the steps below.
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 *Sterling National Bank Personal* in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Log in to SterlingConnect at <https://sterlingconnect.com> and access Personal Online Banking from the *Applications menu > click on the desired account tile to view transactions > More Actions > Export transactions > enter the date of transactions posted after you disconnected your accounts from Astoria Bank (From Date), enter the desired To Date > select to appropriate format > click Export*. **Download** a file of your transactions to your computer.

NOTE: Take note of the date you last had a successful connection and disconnected your accounts to prevent duplicate transactions.. 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.

Thank you for making these important changes!