

Quicken for Windows Conversion Instructions



Express 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**.

Express Web Connect uses the same User ID and Password as your financial institution's website.

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 > **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: Disconnect Accounts at **Astoria Bank** on or before **08/13/18**

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate**. Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the financial institution name, **Astoria Bank**, and account number. Click **OK** to close the window.
7. Repeat steps for each account to be disconnected.

Task 3: Reconnect Accounts to ***Sterling National Bank Personal*** on or after **08/13/18**

1. You must log into Sterling**Connect** at <https://sterlingconnect.com> and access Personal Online Banking from the Applications menu at least once prior to completing the steps below.
2. Choose **Tools** menu > **Account List**.
3. Click the **Edit** button of the account you want to activate.
4. In the **Account Details** dialog, click the **Online Services** tab.
5. Click **Set up Now**.
6. Use **Advanced Setup** to activate your account.
7. Enter ***Sterling National Bank Personal*** in the search field, select the name in the list and click **Next**.
8. If presented with the Select Connection Method screen, select **Express Web Connect**.
9. Enter your Sterling**Connect Username** and **Password**. Click **Connect**.

NOTE: You may be presented with a security question from your Personal Online Banking prior to receiving your accounts. If you have problems with authenticating your session, please call us at 800-278-6742.

10. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching accounts in the drop-down menu.

IMPORTANT: Do **NOT** select **Add to Quicken** unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

11. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
12. Click **Done** or **Finish**.

Thank you for making these important changes!