

# Quicken for Windows Conversion Instructions

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## 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

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

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1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up Your Data** and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Update Software** and follow the instructions.

#### Task 2: Disconnect Accounts at **Astoria Bank** on or before **08/10/18**

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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.

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

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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. To download your Quicken Web Connect file, go to Sterling**Connect** at <http://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* > *save to your desired location on your computer.*

**NOTE:** Take note of the date you last had a successful connection and disconnected your account to prevent duplicate transactions. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

3. Click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.
4. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

**IMPORTANT:** Do **NOT** select **Create a new account** 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** or click the **Cancel** button.

5. Repeat steps for each account to be reconnected.

***Thank you for making these important changes!***