

Quicken for Mac 2007 Conversion Instructions



Web Connect

Introduction

As **Astoria Bank** completes its system conversion 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 Your Data**,” and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates**, select “**Checking for Updates to Quicken**,” and follow the instructions.

Task 2: Connect to **Astoria Bank** for a final download on or before **08/10/18**

1. Choose **Online** menu > **Download Transactions**.
2. Select your account from the drop-down list.
3. Click **Download** to access Astoria Bank at <https://www.astoriabank.com/>.
4. Enter your Online Banking with Bill Pay **User ID** and **Password** to login to the website. Download your transactions through **08/10/18** into Quicken.
5. Repeat the download process for each account you have (such as checking, savings, etc.).
6. Once all accounts have been downloaded, accept all transactions into your Quicken account registers.

Task 3: Disconnect Accounts at **Astoria Bank** on or after **08/10/18**

1. Choose **Lists** menu > **Accounts**.
2. Select the account to deactivate and click **Edit**.
3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
4. Remove the information within the **Account Number** and **Routing Number** fields.
5. Click **OK** to save your edits.
6. Repeat steps 2 – 5 for each account to be disconnected.
7. Verify your account list does not display a blue online circle icon for the accounts you are disconnecting.
8. Take note of the date you disconnected your accounts.

Task 4: Connect Accounts at **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. 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 the 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 accounts to prevent duplicate transactions. If you have overlapping dates in the Web Connect import, you may end up with duplicate transactions.

3. Import your transactions to Quicken.
4. Associate the account to the appropriate account already listed in Quicken. Select **Use an existing account**.
5. Match the transactions you are importing to the corresponding existing Quicken account in the drop-down list and click **OK**.
6. Repeat steps for each account to be reconnected.
7. Choose **Lists** menu > **Accounts**. Verify each account at **Sterling National Bank Personal** has a blue online circle indicating it has been reactivated for online services.

Thank you for making these important changes!