

Quicken for Mac

Web Connect



Introduction

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

Documentation and Procedures

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.
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.