

Quicken for Mac

Web Connect to Direct Connect



Introduction

To complete these instructions, you will need your login credentials for online banking and/or Direct Connect.

Documentation and Procedures

1. Select your account in the **Accounts** list on the left sidebar.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download**.
4. Enter **Winchester Savings Bank** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
5. Enter your Direct Connect **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

NOTE: Select "Direct Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, associate each new account to accounts in your Quicken data file. Under the **Action** column, select "**Link**" to pick your existing account. When complete, click Finish.

IMPORTANT: Do **NOT** select "**ADD**" under the action column unless you intend to add a new account to Quicken.