Quicken Windows Web Connect

Step 1: Back up Quicken file

1. Back up your Quicken Windows Data File. Go to **File > Backup and Restore > Backup Quicken File**.
2. Download the latest Quicken Update. Go to **Help > Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

Step 2: Deactivate Direct Connect

1. Deactivate your online banking connection for accounts connected to Institution for Savings.
    a. Choose **Tools > Account List**.
    b. Click **Edit** on the account to deactivate.
    c. In Account Details, click **Online Services**.
    d. Click **Deactivate**. Follow prompts to confirm deactivation.
    e. Click the **General** tab.
    f. Delete Financial Institution and Account Number information. Click **OK** to close window.
    g. Repeat steps for any additional accounts that apply.

Step 3: Activate a Web Connect account:

1. Log into Institution for Savings Online Banking, click the option to download your account information as a Web Connect (QFX) file.

    IMPORTANT: Take note of your last successful download from Step 1. Duplicate transactions can occur if you have overlapping transaction dates in the new transaction download.
2. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
3. Use the import dialog to select the Web Connect file you downloaded. An “Import Downloaded Transactions” window opens.
4. Choose **Link to an existing account**. Select the matching account from the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
5. Repeat this step for each account you have connected to this institution.

Quicken Mac Web Connect

Step 1: Back up Quicken file

1. Back up your Quicken Mac Data File. Go to **File > Save a Backup**.
2. Download the latest Quicken Update. Go to **Quicken > Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

Step 2: Deactivate Direct Connect

1. Deactivate your online banking connection for accounts connected to Institution for Savings.
   - h. Select the account from the account list on the left side of Quicken
   - i. Select the **Settings** icon in the lower-right corner of the account register.
   - j. Select the **Download** tab.
   - k. Select **Disconnect Account**.
   - l. Confirm the disconnection if prompted.
   - m. Select **Done**.
   - n. Repeat steps for any additional accounts that apply.

Step 3: Activate a Web Connect account:

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter your Institution for Savings in the search field, select the correct option and click **Continue**.
5. Log into your Institution for Savings Online Banking and download your transactions to your computer.

   Important: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.
6. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **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, click **Link** to pick your existing account.

   Important: Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken.
8. Click **Finish**.