Manuals+ — User Manuals Simplified.

Quicken Mac Express Web Connect

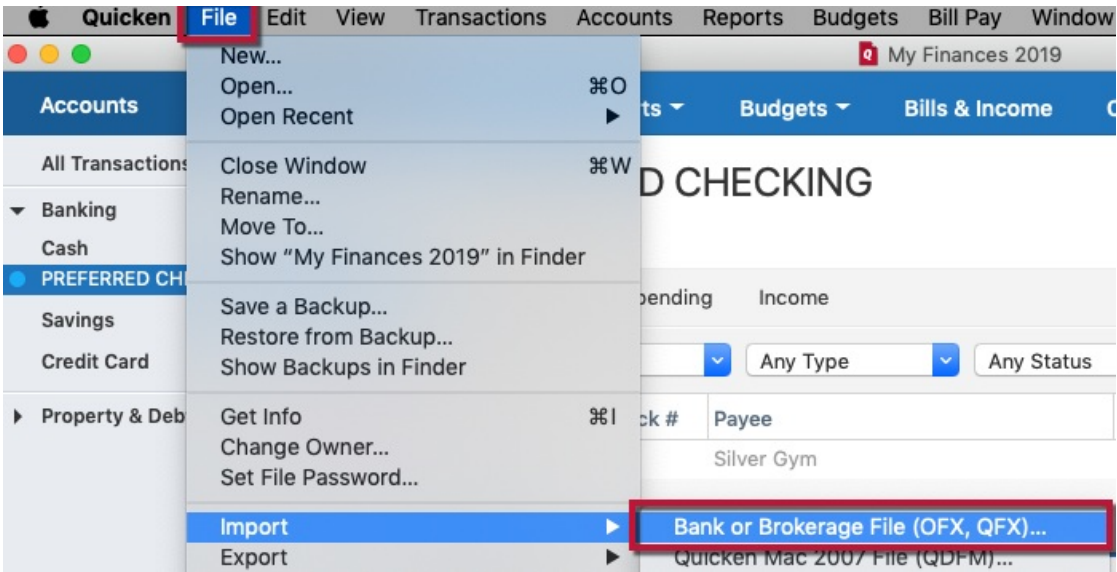# Quicken Mac Express Web Connect Instructions

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Quicken Mac Express Web Connect

Quicken Conversion Instructions

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Instructions for One-Step Update initiated from within Quicken:

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Quicken Windows Express Web Connect

Backup Data and Update Quicken:

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.

Reconnect Accounts:

1. Deactivate online banking connection for accounts connected to Westerra.
   - Choose Tools > Account List.
   - Click Edit on the account to deactivate.
   - In Account Details, click Online Services.
   - Click Deactivate. Follow prompts to confirm deactivation.
   - Click the General tab.
   - Delete Financial Institution and Account Number information. Click OK to close window.
   - Repeat steps for any additional accounts that apply.
2. Reconnect the online banking connection for your accounts.
   - Choose Tools > Account List.
   - Click Edit on the account you want to activate.
   - In Account Details, click Online Services and then choose Set up Now.
   - Type "Westerra Credit Union" in the search field and click Next.
   - Enter your Westerra Digital Banking credentials.
   - Express Web Connect uses the same credentials you use for Westerra's Digital Banking
   - Important: If your credentials do not work, contact Westerra Credit Union.
   - Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select Link to an existing account and select the matching accounts in the drop-down menu.
   - **Important**: Do NOT choose "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, choose Ignore – Don't Download into Quicken or click Cancel.
   - After all accounts have been matched, click Next and then Done.

Backup Data and Update Quicken:

1. Backup Quicken Mac Data File and Update the application.
   1. Choose File > Save a Backup.

2. Download the latest Quicken Update. Choose Quicken > Check for Updates.

Reconnect Accounts:
Activate the online banking connection for accounts connected to Westerra.

1. Click your account in the Accounts list on the left side.
2. Choose Accounts > Settings.
3. Select Set up transaction download.
4. Enter "Westerra Credit Union" in the search field, select the correct option and click Continue.
5. Enter your Westerra Digital Banking credentials
   - Express Web Connect uses the same credentials you use for your Westerra Digital Banking login
   - Important: If your credentials do not work, contact Westerra
6. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under Action, choose 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.
7. Click Finish.

Backup Data and Update Quicken

1. Backup Quicken Windows Data File and Update.
   - Choose File > Backup and Restore > Backup Quicken File.
   - Download the latest Quicken Update. Choose Help > Check for Updates..

Reconnect Accounts:

1. Deactivate online banking connection for accounts connected to Westerra
   - Choose Tools > Account List.
   - Click Edit on the account to deactivate.
   - In Account Details, click Online Services.
   - Click Deactivate. Follow prompts to confirm deactivation.
   - Click the General tab.
   - Delete Financial Institution and Account Number information.
   - Click OK to close window.
   - Repeat steps for any additional accounts.
2. Reconnect online banking connection for accounts that apply.
   - Download a Quicken Web Connect file from your Westerra Digital Banking account
   - In Quicken, choose File > File Import > Web Connect (.QFX) File.
   - Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
   - Choose Link to an existing account. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
   - Repeat this step for each account you have connected to Westerra

Backup Data and Update Quicken

1. Backup your Quicken Mac data file and update the application.
   - Choose File > Save a Backup.
   - Download the latest Quicken Update. Choose Quicken > Check for Updates.

Reconnect Accounts:
Activate online banking connection for accounts connected to Westerra

1. Select your account under the Accounts list on the left side.
2. Choose Accounts > Settings.
3. Select Set up transaction download.
4. Enter "Westerra Credit Union" in the search field, select the correct option and click Continue.
5. Log in to Westerra's Digital Banking site 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

Documents / Resources

Quicken Mac Express Web Connect [pdf] Instructions
Mac Express Web Connect, Express Web Connect, Web Connect, Connect

References

- **User Manual**