Instructions for One-Step Update initiated from within Quicken

Instructions for Downloading a Web Connect file from our ANB Bank Digital Banking Site

Quicken Windows Express Web Connect

1. Deactivate online banking connection for accounts connected to the financial institution that is requesting this change.

   a. Choose **Tools > Account List.**

   b. Click **Edit** on the account to deactivate.

   c. In Account Details, click **Online Services.**

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   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.

2. Reconnect the online banking connection for your accounts.

   a. Choose **Tools > Account List.**

   b. Click **Edit** on the account you want to activate.

   c. In Account Details, click **Online Services** and then choose **Set up Now.**

   d. Type your institution's name in the search field and click Next.

   e. Enter your financial institution credentials.

      - Express Web Connect uses the same credentials you use for your institution's online banking login.

   Important: If your credentials do not work, contact your financial institution.

   f. 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.**

   g. After all accounts have been matched, click **Next** and then **Done**

Quicken Mac Express Web Connect

Activate the online banking connection for accounts connected to the financial institution that is requesting this change.

1. Click your account in the Accounts list on the left side.

2. Choose **Accounts > Settings.**

3. Select **Set up transaction download.**

4. Enter your financial institution name in the search field, select the correct option and click **Continue.**

5. Enter your financial institution credentials.

    • Express Web Connect uses the same credentials you use for your institution's online banking login.

    Important: If your credentials do not work, contact your financial institution.

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.**

Quicken Windows Web Connect

1. Deactivate online banking connection for accounts connected to financial institution that is requesting this change.

    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.

    g. Click **OK** to close window.

    h. Repeat steps for any additional accounts.

2. Reconnect online banking connection for accounts that apply.

    a. Download a Quicken Web Connect file from your financial institution's online banking site.

    b. In Quicken, choose **File > File Import > Web Connect (.QFX) File.**

    c. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.

    d. 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.

    e. Repeat this step for each account you have connected to this institution.

Quicken Mac Web Connect

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 financial institution name in the search field, select the correct option and click **Continue.**

5. Log into your financial institutions online 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.**