

Quicken for Mac Conversion Instructions



Quicken for Mac 2015-2016

Web Connect

Introduction

As Keystone Savings Bank completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your **[User ID and Password]** for the Keystone Savings Bank website.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up**, select **Backing up data files**, and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates**, select “Check for Updates,” and follow the instructions.

Task 2: Deactivate Your Account(s) at Keystone Savings Bank on or after **2/22/2016**

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Troubleshooting** > **Deactivate Downloads**.
4. Repeat steps for each account at Keystone Savings Bank.

Task 3: Reactivate Your Account(s) at Keystone Savings Bank on or after **2/22/2016**

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 Keystone Savings Bank in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Log in to Keystone Savings Bank. **Download** a file of your transactions to your computer.
6. 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.
7. Drag and drop the downloaded file into the box **Drop download file**.

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

8. 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.

9. Click **Finish**.
10. Repeat steps for each account you are reactivating in Quicken.

Quicken for Mac Conversion Instructions



Quicken for Mac 2015-2016

Express Web Connect

Introduction

As Keystone Savings Bank completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your **[User ID and Password]** for the Keystone Savings Bank website.

NOTE: Quicken Express Web Connect accounts use the same User ID and PIN/Password as Keystone Savings Bank website.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

Documentation and Procedures

Task 4: Conversion Preparation

5. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up**, select **Backing up data files**, and follow the instructions.
6. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates**, select “Check for Updates,” and follow the instructions.

Task 5: Deactivate Your Account(s) at Keystone Savings Bank on or after 2/22/2016

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Troubleshooting** > **Deactivate Downloads**.
4. Repeat steps for each account at Keystone Savings Bank.

Task 6: Reactivate Your Account(s) at Keystone Savings Bank on or after 2/22/2016

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 Keystone Savings Bank in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Enter your **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

NOTE: Select "Express Web Connect" or "Quicken 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.

8. Select **Finish**.

Quicken for Windows Conversion Instructions



Quicken for Windows 2013–2016

Web Connect

Introduction

As Keystone Savings Bank completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your **[User ID and Password]** for the Keystone Savings Bank website.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

Documentation and Procedures

Task 7: Conversion Preparation

9. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up Your Data** and follow the instructions.
10. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Update Software** and follow the instructions.

NOTE:

Task 8: Deactivate Accounts at Keystone Savings Bank on or after **2/22/2016**

11. Choose **Tools** menu > **Account List**.
12. Click the **Edit** button of the account you want to deactivate.
13. In the **Account Details** dialog, click on the **Online Services** tab.
14. Click **Deactivate**. Follow the prompts to confirm the deactivation.
15. Click on the **General** tab.
16. Remove the financial institution name and account number. Click **OK** to close the window.
17. Repeat steps for each account you wish to deactivate.

Task 9: Reactivate Accounts at Keystone Savings Bank on or after **2/22/2016**

1. Download your Quicken Web Connect file from Keystone Savings Bank.

IMPORTANT: Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

2. Click **File > File Import > Web Connect File**. Locate and select the Web Connect file to import.
3. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

IMPORTANT: Do **NOT** select **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, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.

4. Repeat steps for each account you wish to reactivate in Quicken.

Quicken for Windows Conversion Instructions



Quicken for Windows 2013-2016

Express Web Connect

Introduction

As Keystone Savings Bank completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your **[User ID and Password]** for the Keystone Savings Bank website.

NOTE: Quicken Web Connect/Express Web Connect accounts use the same User ID and PIN/Password as Keystone Savings Bank website.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

Documentation and Procedures

Task 10: Conversion Preparation

18. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Quicken Help**. Search for **Backup Data File** and follow the instructions.

19. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Quicken Help**. Search for **Update Software** and follow the instructions.

Task 11: Deactivate Your Accounts at Keystone Savings Bank on or after **2/22/2016**

20. Choose **Tools** menu > **Account List**.
21. Click the **Edit** button of the account you want to deactivate.
22. In the **Account Details** dialog, click on the **Online Services** tab.
23. Click **Deactivate**. Follow the prompts to confirm the deactivation.
24. Click on the **General** tab.
25. Remove the financial institution name and account number. Click **OK** to close the window.
26. Repeat steps 2—6 for each account to be deactivated.

Task 12: Re-activate Your Accounts at Keystone Savings Bank on or after **2/22/2016**

27. Choose **Tools** menu > **Account List**.
28. Click the **Edit** button of the account you want to activate.
29. In the Account Details dialog, click on the **Online Services** tab.
30. Click **Set up Now**.
31. Use **Advanced Setup** to activate your account.
32. Enter Keystone Savings Bank and click **Next**.
33. If presented with the Select Connection Method screen, select **Express Web Connect**.
34. Enter your **User ID** and **Password**. Click **Connect**.

NOTE: You may be presented with a security question from your Financial Institutions prior to receiving your accounts.

35. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching accounts in the drop-down menu.

IMPORTANT: Do **NOT** select **Add to Quicken** 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, select **Ignore – Don't Download into Quicken**.

36. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
37. Click **Done** or **Finish**.

Quicken for Mac Conversion Instructions



Quicken for Mac 2007

Web Connect

Introduction

As Keystone Savings Bank completes its system conversion you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your **[User ID and Password]** for the Keystone Savings Bank website.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

Documentation and Procedures

Task 13: Conversion Preparation

38. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up**, select “**Backing Up Your Data**,” and follow the instructions.
39. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates**, select “**Checking for Updates to Quicken**,” and follow the instructions.

Task 14: Deactivate Your Accounts at Keystone Savings Bank on or after **2/22/2016**

40. Choose **Lists** menu > **Accounts**.
41. Select the account to deactivate and click **Edit**.
42. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.

43. Remove the information within the **Account Number** and **Routing Number** fields.
44. Click **OK** to save your edits.
45. Repeat steps 2 – 5 for each account at Keystone Savings Bank.
46. Verify your account list does not display a blue online circle icon for the accounts you are deactivating.

Task 15: Reactivate Your Accounts at Keystone Savings Bank on or after 2/22/2016

47. Download your Quicken Web Connect file from **Keystone Savings Bank**.

IMPORTANT: Take note of the date you last had a successful connection. If you have overlapping dates in the Web Connect import, you may end up with duplicate transactions.

48. Import your transactions to Quicken.
49. Associate the account to the appropriate account already listed in Quicken. Select **Use an existing account**.
50. Match the transactions you are importing to the corresponding existing Quicken account in the drop-down list and click **OK**.
51. Repeat steps for each account you are reactivating.
52. Choose **Lists** menu > Accounts. Verify each account at Keystone Savings Bank has a blue online circle indicating it has been reactivated for online services.