



## Quicken Conversion Instructions

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As Meridian Bank completes its system conversion, you will need to modify your Quicken settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for both Windows and Mac, and connectivity types (ExpressWeb Connect or Web Connect).

**IMPORTANT:** Express Web Connect may not be available until February 23, 2022, so please utilize another connectivity type if you need transaction updates during this downtime. There is no delay for Web Connect.

To navigate this document, click the link or links below that match your product and connectivity:

Instructions for One-Step Update initiated from within Quicken

[Quicken Windows Express Web Connect](#) - Page 2

[Quicken Mac Connect](#) - Page 3

Instructions for Downloading a Web Connect file from your Online Banking Site

[Quicken Windows Web Connect](#) - Page 4

[Quicken Mac Web Connect](#) - Page 5

## Quicken Windows Express Web Connect

On or before February 14, 2022:

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.

On or after February 15, 2022 at 8:00 AM:

1. Deactivate online banking connection for accounts connected to Meridian Bank.
  - 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.
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 Meridian Bank in the search field and click Next.
  - e. Enter your Meridian Bank credentials.
    - Express Web Connect uses the same credentials you use for Meridian Bank's online banking login.

**Important: If your credentials do not work, email [customersupport@meridianbanker.com](mailto:customersupport@meridianbanker.com) or call 484.395.2061.**

- 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 Connect

On or before February 14, 2022:

1. Backup Quicken Mac Data File and Update the application.
  - a. Choose **File > Save a Backup**.
  - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
  - a. Complete last transaction update before the change to get all your transaction history up to date.
  - b. Accept all new transactions into the appropriate registers.

On or after February 15, 2022 at 8:00 AM:

**Activate the online banking connection for accounts connected to Meridian Bank.**

1. Click your account in the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Meridian Bank in the search field, select the correct option and click **Continue**.
5. Enter your Meridian Bank credentials.
  - Express Web Connect uses the same credentials you use for Meridian Bank's online banking login.

**Important: If your credentials do not work, email [customersupport@meridianbanker.com](mailto:customersupport@meridianbanker.com) or call 484.395.2061.**

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

On or before February 14, 2022:

1. Backup Quicken Windows Data File and Update.
  - a. Choose **File > Backup and Restore > Backup Quicken File**.
  - b. Download the latest Quicken Update. Choose **Help > Check for Updates**.
2. Complete a final transaction download.
  - a. Complete last transaction update before the change to get all of your transaction history up to date.
  - b. Repeat this step for each account you need to update.
  - c. Accept all new transactions into the appropriate registers.

On or after February 15, 2022 at 8:00 AM:

1. Deactivate online banking connection for accounts connected to Meridian Bank.
  - 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 Meridian Bank'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

On or before February 14, 2022:

1. Backup your Quicken Mac data file and update the application.
  - a. Choose **File > Save a Backup**.
  - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
  - a. Complete last transaction update before the change to get all of your transaction history up to date.
  - b. Repeat this step for each account you need to update.
  - c. Accept all new transactions into the appropriate registers.

On or after February 15, 2022 at 8:00 AM:

**Activate online banking connection for accounts connected to Meridian Bank.**

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Meridian Bank in the search field, select the correct option and click **Continue**.
5. Log into Meridian Bank's 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**.