

Quicken Conversion Instructions

As PeoplesBank completes our system upgrade, 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 all three connectivity types (Direct Connect, Express Web Connect or Web Connect). After the upgrade on June 23, Direct Connect users will use Web Connect.

These instructions refer to two "Action Dates." The 1st Action Date, June 18, 2025 and 2nd Action Date, June 23, 2025.

IMPORTANT: Express Web Connect will not be available until 5 business days after the 2nd Action Date, June 23, 2025, so please utilize another connectivity type if you need transaction updates during this downtime. There is no delay for Web Connect or Direct Connect (if supported)

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

Instructions for One-Step Update initiated from within Quicken

[Quicken Windows Direct Connect and Express Web Connect](#) -

[Quicken Mac Direct Connect and Quicken Connect](#) -

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

[Quicken Windows Web Connect](#)

[Quicken Mac Web Connect](#)

Quicken Windows Direct Connect and Express Web Connect

On the 1st Action Date, June 18, 2025:

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 the 2nd Action Date, June 23, 2025:

1. Deactivate online banking connection for accounts connected to PeoplesBank
 - 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 PeoplesBank 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 PeoplesBank 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 Direct Connect and Quicken Connect

On the 1st Action Date, June 18, 2025:

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 of your transaction history up to date.
 - b. Accept all new transactions into the appropriate registers.

On the 2nd Action Date, June 23, 2025:

Activate online banking connection for accounts connected to PeoplesBank

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

Quicken Windows Web Connect

On the 1st Action Date, June 18, 2025:

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 the 2nd Action Date, June 23, 2025:

3. Deactivate online banking connection for accounts connected to PeoplesBank
 - 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 PeoplesBank and Account Number information.
 - g. Click **OK** to close window.
 - h. Repeat steps for any additional accounts.
4. Reconnect online banking connection for accounts that apply.
 - a. Download a Quicken Web Connect file from PeoplesBank 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 the 1st Action Date, June 18, 2025:

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 the 2nd Action Date, June 23, 2025:

Activate online banking connection for accounts connected to PeoplesBank

9. Select your account under the Accounts list on the left side.
10. Choose **Accounts > Settings**.
11. Select **Set up transaction download**.
12. Enter PeoplesBank in the search field, select the correct option and click **Continue**.
13. Log into PeoplesBank 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.
14. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web Connect** for the "Connection Type" if prompted
15. 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.
16. Click **Finish**.