

# Quicken Web Connect Users

## Disconnect & Reconnect for Windows

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### Disconnect Steps

1. Click **Tools > Account List**
2. Click **Edit** on the account to deactivate
3. In **Account Details**, click **Online Services**
4. Click **Deactivate**, then follow the prompts to confirm deactivation
5. Click the **General** tab
6. Delete **Roscoe Bank** and **Account Number** information, then click **OK**
7. Repeat the steps for any additional accounts that apply

### Reconnect Steps

1. Download a Quicken **Web Connect** file from Roscoe's online banking site
2. In Quicken, choose **File > File Import > Web Connect (.QFX) File**
3. Use the import dialog to select the **Web Connect** file you downloaded; an **Import Downloaded Transactions** window will open
4. Choose **Link to an existing account**, then select the matching account in the drop-down menu
  - Associate the imported transactions to the correct account listed in Quicken
5. Repeat this step for each account you have connected to this institution

# Disconnect & Reconnect for Mac

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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 Roscoe in the search field and click **Continue**
5. Log into your Roscoe online banking account and download your transactions to your computer

**Important: Take note of the date of your last 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**