



Quicken Conversion Instructions

As your financial institution 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: Direct Connect, Express Web Connect (Windows), Quicken Connect (Mac), and Web Connect.

Action Dates

These instructions refer to two "Action Dates." The dates below are the 1st Action Date and 2nd Action Date provided in bank communications.

Action Date	Date	Required Action
1st Action Date	October 9, 2026	Back up the data file, update Quicken, complete the final transaction download, and accept all new transactions into the appropriate registers.
2nd Action Date	October 13, 2026	Deactivate affected automatic connections and follow the instructions for your method. Direct Connect and Web Connect are available on or after this date; Express Web Connect and Quicken Connect resume five business days later.

Important: Express Web Connect (Windows) and Quicken Connect (Mac) will not be available until five business days after the 2nd Action Date, October 13, 2026. Use Web Connect if transaction updates are needed during this period.

There is no additional delay for Web Connect or Direct Connect (if supported); these methods are available on or after October 13, 2026.

Choose Your Connection Method

Quicken Windows Direct Connect and Express Web Connect

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Use these instructions for One-Step Update initiated from within Quicken on Windows.

Quicken Mac Direct Connect and Quicken Connect

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Use these instructions for transaction updates initiated from within Quicken on Mac.

Quicken Windows Web Connect

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Use these instructions to download a Web Connect file from your online banking site and import it into Quicken on Windows.

Quicken Mac Web Connect

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Use these instructions to download a Web Connect file from your online banking site and import it into Quicken on Mac.

Quicken Windows Direct Connect and Express Web Connect

On the 1st Action Date: October 9, 2026

1. Back up your Quicken Windows Data File. Go to File > Copy or Backup File... > Create a complete backup > click Next.
2. If needed, under "Where would you like to put your backup copy?" click Change to update the file location. Click Save Backup.
3. Download the latest Quicken Update. Go to **Help > Check for Updates**.
4. Complete a final transaction download. Accept all new transactions into the appropriate registers.

On the 2nd Action Date: October 13, 2026

Important: Reconnect Direct Connect on or after October 13, 2026. Reconnect Express Web Connect five business days after the 2nd Action Date, October 13, 2026. Use Web Connect if transaction updates are needed during this period.

Deactivate the online banking connection on October 13, 2026 for accounts connected to the financial institution that is requesting this change.

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

Reconnect the online banking connection for your accounts at the timing above.

1. Choose **Tools > Account List**.
2. Click **Edit** on the account you want to activate.
3. In Account Details, click **Online Services** and then choose **Set up Now**.
4. For Direct Connect, type Western Alliance Digital Bank DC in the search field, select that option, and click Next. For Express Web Connect, type your institution's name, select the correct option, and click Next.
5. Enter your financial institution credentials.
 - a. Express Web Connect uses the same credentials you use for your institution's online banking login.
 - b. Direct Connect might require credentials that do not match your online banking credentials.

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

6. 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.

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

Quicken Mac Direct Connect and Quicken Connect

On the 1st Action Date: October 9, 2026

1. Back up 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 the 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: October 13, 2026

Disconnect the existing automatic connection

Select the affected account in the Accounts list.

Choose Accounts > Settings (or the gear icon), and then select Downloads.

Click Disconnect Account, and then click Done.

Repeat for each affected connected account. Do not delete the account or its register.

Reconnect at the time for your connection method

Important: Reconnect Direct Connect on or after October 13, 2026. Reconnect Quicken Connect five business days after the 2nd Action Date, October 13, 2026. Use Web Connect if transaction updates are needed during this period.

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. For Direct Connect, enter Western Alliance Digital Bank DC in the search field, select that option, and click Continue. For Quicken Connect, enter your financial institution's name, select the correct option, and click Continue.
5. Enter your financial institution credentials.
 - Quicken Connect uses the same credentials you use for your institution's online banking login.
 - Direct Connect might require credentials that do not match your online banking credentials.

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

On the 1st Action Date: October 9, 2026

1. Back up your Quicken Windows data file and update the application.
 - 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 the 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: October 13, 2026

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

1. Choose **Tools > Account List**.
2. Click **Edit** on the account to deactivate.
3. In Account Details, click **Online Services**.
4. Click **Deactivate**. Follow prompts to confirm deactivation.
5. Click the **General** tab.
6. Delete Financial Institution and Account Number information.
7. Click OK to close the window.
8. Repeat steps for any additional accounts.

Reconnect the online banking connection for accounts that apply.

1. Download a Quicken Web Connect file from your financial institution'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 opens.
4. 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.
5. Repeat this step for each account you have connected to this institution.

Quicken Mac Web Connect

On the 1st Action Date: October 9, 2026

1. Back up 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 the 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: October 13, 2026

Disconnect an existing automatic connection, if applicable

If an existing automatic connection is connected, complete the steps below. If you use only manual Web Connect, proceed to the existing download and import steps.

Select the affected account in the Accounts list.

Choose Accounts > Settings (or the gear icon), and then select Downloads.

Click Disconnect Account, and then click Done.

Repeat for each affected connected account. Do not delete the account or its register.

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

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Western Alliance-Digital Banking in the search field, select that option, and click Continue.
5. Log in to your financial institution's online banking site and download your transactions to your computer as a Quicken Web Connect (.qfx) file.

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**.