

Quicken for Windows Instructions

Introduction

With **Bryn Mawr Trust's Consumer/Small Business Online Banking System**, you are able to download transactions into Quicken via Web Connect or Direct Connect. To complete these instructions, you will need your **User ID and Password** for the Bryn Mawr Trust Online Banking.

When downloading transactions into Quicken from *Bryn Mawr Trust's Consumer/Small Business Online Banking System* the Quicken Reference will be called **Bryn Mawr Trust-Consumer-SB**.

Bryn Mawr Trust Customer Service may be reached at 610.525.1700.

Documentation and Procedures – Web Connect

Download transactions using Web Connect

1. Log in to <https://online.bmtc.com> and download your Quicken Web Connect file. You have two options – Open or Save. If you select Open, you will be connected directly to Quicken and go to steps 6 & 7.
2. Save this file.
3. Open Quicken.
4. Click **File > File Import > Web Connect File**.
5. If prompted for connectivity type, select **Web Connect**.

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. If you have previously downloaded transactions, 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 account in the drop-down menu.
7. If you have not previously downloaded transactions, select **Create a new account**, select the account type in the drop-down menu and enter a Nickname.

Documentation and Procedures – Direct Connect

Download transactions using Direct Connect

1. Open Quicken.
2. Choose **Tools** menu > **Add Account**.
3. Select the **Check or Savings** link under **Spending & Savings**.
4. Enter the name “**Bryn Mawr Trust**” when prompted to enter the name of your bank.
5. You will be presented with several options - Select **Bryn Mawr Trust-Consumer-SB**
6. You will be prompted to enter you User ID and Password **from your Consumer/Small Business Online Banking Account**. Type your **User ID** and **Password**; you have the option to save this password or you can re-enter it each time you log-in to Quicken and click **Connect**.
7. You will want to select **Add to Quicken** and modify Nickname and click **Next**.
8. After all accounts have been added, click **Finish**.