



DOWNLOAD YOUR
ACCOUNT INFORMATION
INTO QUICKEN

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Downloading Transactions into Quicken

1. Log in to online banking and click on **Accounts** from your Dashboard. Select the account with the transactions you wish to download. Click the **Export** icon (next to the printer icon above the Balance column) to begin the export.
2. Next, within the **Export** dialog box, choose **Quicken (qfx)** file format from the Export Format drop down and click **Export**.
3. Open your Quicken application and open the exported file.
4. Quicken will give you the option to process the transactions now, or save the file for later. Choose **Have Quicken process these transactions now**.
5. If this is the first time you have downloaded information for this account, or if Quicken cannot determine which account to download the transactions into, you will be prompted to identify the Quicken account you use to track this financial information.
6. If you have already set up a Quicken account for this account, **click Use existing Quicken account**, then choose the account from the list provided.
7. If you have not yet set up a Quicken account for this account, **click Create a new Quicken account**, then **Continue**.
8. Click **Continue** again. Your recent account history will be downloaded into Quicken. Depending on the amount of information being sent, you may see a progress bar indicating how much of the transfer is complete.
9. When your recent account history has been transferred, accept the downloaded transactions into Quicken.

Downloading Transactions Using One-Step Update

You can also download your account information by using Quicken One-Step Update. Please refer to the Help documentation available within the Quicken software for step-by-step instructions.

Note: If you are using Quicken version 2008, only six new accounts can be imported at a time. If you have more than six new accounts to import, you will need to perform the new account import multiple times.

Quicken Technical Support

Only the three most recent versions of Quicken are supported. If you use an older version, it is recommended that you upgrade. Additionally, only the two most recent versions of Quicken are supported for One-Step Update. For additional information, visit quicken.intuit.com.