

# Web Connect Quicken Guide

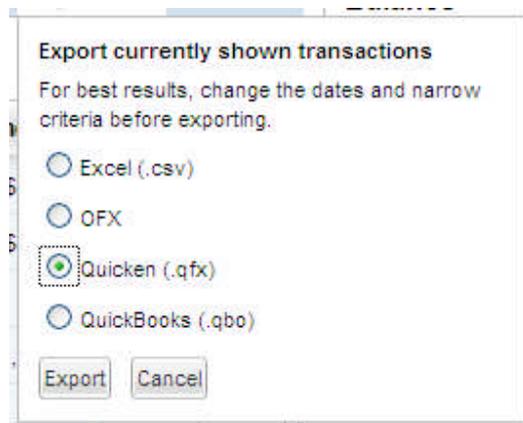
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Steps to export account history using Quicken Web Connect.

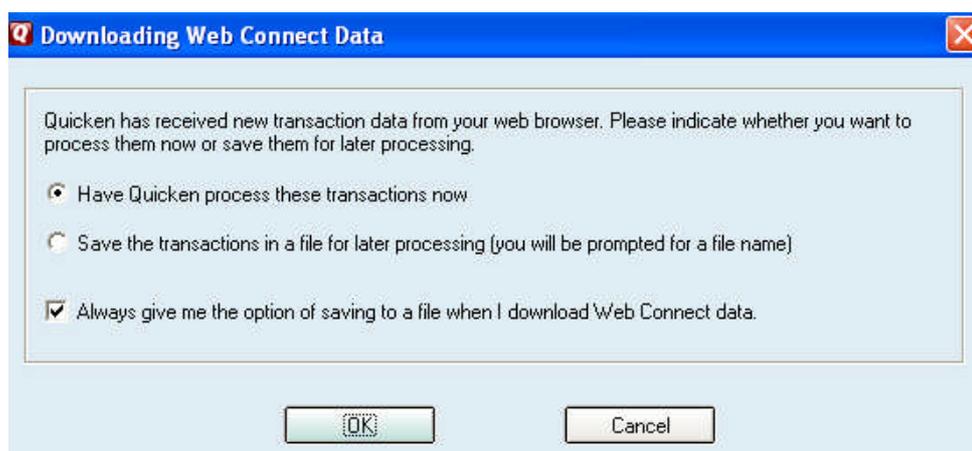
1. Log into Elevations online banking
2. Click on an Account Description for the account you want to download transactions for
  - a. This will take you to the History Page for that account
3. Click Export



4. Choose the Export Format – Quicken (.qfx)



5. Click Export
6. Choose to Open or Save the File



- a. Save = Save a copy to your computer for later use
- b. Open = Quicken will load automatically and will recognize the account you are downloading transactions for and will allow you to select an option
  1. Use an existing Quicken account

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## 2. Create a new Quicken account

The screenshot shows a dialog box titled "Quicken 2011 Premier - Quicken Data - [Home]". The main heading is "You are downloading transactions for the following account:". Below this, there are three bullet points: "Financial Institution : Elevations Credit Union IB WC-DC", "Account type : Savings", and "Account number : [redacted] x00". A paragraph of instructions follows: "If you have set up an account in Quicken to track this account, choose 'Use an existing Quicken account' and then select it from the list. Otherwise, choose 'Create a new Quicken account' and Quicken will add one for you." There are two radio button options: "Use an existing Quicken account:" with a dropdown menu, and "Create a new Quicken account:" with a text input field containing "Savings at Elevations Credit Union IB WC". At the bottom, there are three buttons: "Continue", "Cancel", and "Help".

**You are downloading transactions for the following account:**

- Financial Institution : Elevations Credit Union IB WC-DC
- Account type : Savings
- Account number : [redacted] x00

If you have set up an account in Quicken to track this account, choose "Use an existing Quicken account" and then select it from the list. Otherwise, choose "Create a new Quicken account" and Quicken will add one for you.

Use an existing Quicken account:  
Please choose from the list.

Create a new Quicken account:  
Please type an account name.

Continue      Cancel      Help

## 7. Click Continue

## 8. Transactions are downloaded into your Quicken register