**What you need to get started**
Before you can set up Online Banking and Web Connect download to Quicken® from your online accounts, you will need:

* Quicken Deluxe 2015® (or newer) for Windows or Mac
* Quicken Premier 2015® (or newer) for Windows or Mac
* Quicken Starter Edition 2015®  (or newer) for Windows or Mac
* Internet access
* Online Banking ID and Password from TVACCU

If you are not enrolled in Online Banking, enroll online at [www.tvaccu.com](http://www.tvaccu.com) - click Online Banking from the homepage.

Using Web Connect

1. Refer to Intuit's User Guide for instructions specific to your version of Quicken®.
2. Sign in to Online Banking.
3. From the Accounts Summary Page, select the account you want to download transactions and choose Download from the drop down menu. You will be taken to the Download Transactions page.
4. Choose a date range of transactions to download.
5. From the Format drop down menu, choose Quicken®.
6. The File Download dialog box will prompt you with, "What would you like to do with this file?"
	* Selecting Open this file from its current location will immediately import your data into Quicken®.
	* Selecting Save it to a disk saves a file in a specific location on your computer, which you can manually import into Quicken®. Remember to make note of the file location.
7. Make your selection and click OK to continue.
8. If you've selected Open this file from its current location, Quicken® will automatically launch and begin to import your transactions into Quicken®.  If you've selected Save it to a disk, Web Connect will either download the transactions automatically into your register or you will have the option of manually importing the file, using the following menu options in the Quicken® Software: File, then Import and Web Connect File. Enter the location and name of the file saved.
9. If this is the first time you have downloaded information for this account or if Quicken® cannot determine which is the appropriate account, Quicken® asks you to identify the Quicken® account you use to track this financial information.
	* If you have set up a Quicken® account for this download, select Use existing Quicken® account and choose the account from the pop-up list. Click Continue.
	* If you have not yet set up a Quicken® account for this download, select Create a new Quicken® account and enter a name for this account. Click Continue.
10. The Web Connect file will be sent from Online Banking to your Quicken® software. Depending on the amount of information being sent, you may see a progress bar.
11. When the download is complete you will be prompted with "Your Web Connect data has been successfully downloaded into Quicken®." Click OK.
12. Go to the account register in Quicken® and use the Compare to Register feature to accept the downloaded transactions into your account register. There are two ways to accept transactions. Selecting Accept All will automatically place them all into the account register. You can avoid erroneous match-ups by selecting Accept one transaction at time.
13. Repeat the Web Connect process for each of your accounts.