

Quicken Web Connect – Manual Import

1. Login to Online Banking by going to https://www.peoplesbank.bank

Online Banking Login	
Password	CONTINUE

2. From the My Accounts Screen click on the account you want to download transactions from

MY ACCOUNTS (8) Total Deposits (8) \$7,404.35		<u>ક</u> ૮
	Updated: Mar 12, 2019 2:12:07 PM	G
* Checking		\$511.90 > BALANCE: \$511.90

3. Click the download arrow and fill in the required fields; Download Format, Start Date and End Date, then click DOWNLOAD

Checking * Available Balance \$511.90		٩
	SORT: DATE (NEWEST FIRST) →	
Quicken		÷
3/1/19	⇒ 3/12/19	÷

1	
	DOWNLOAD

4. Click Save or Save As and select a location to save the Quicken download file

Do you want to open or save Transactions.qfx (7.73 KB) from api.myebanking.net?	Open	Save 🔻	Cancel	×

5. Click Save

🛃 Save As			×
<u>₹</u> ← → × ↑	> This PC > Desktop > 🌑	✓ ひ Search CSI	Q
File name:	Quicken Transactions		~
Save as type:	Quicken OFX data		~
✓ Browse Folders		Save	Cancel

- 6. Open Quicken
- 7. Go to File/File Import/Web Connect (.QFX) File...

File	Edit View Tools Reports Help				
	New Quicken File		1		
	Open Quicken File	Ctrl+O			
	Save a copy as		INING	INVESTING	ADD-ON SERVICES
	Show this file on my computer				
	Set Password for this data file				
	Set Password to modify transactions				
	Backup and Restore	>			
	File Import	>	Web	b Connect (.QFX) F	ile
	File Export	>	QIF	File	
	File Operations	>	Qui	cken Transfer Form	at (.QXF) File
	Printer Setup	>	Imp	oort security prices	from CSV file
	Print Checks		Tur	boTax File	
	Print Home	Ctrl+P	Mic	rosoft Money® Fil	e
~	1 C:\Users\NHoffman\Documents\Quicken\Nhoffman's Quicken Data				
	Exit				in All
			1		A11 -

8. Click Browse...

Import .QXF File		×
Import .QXF File		
Import account information from the .QXF file into your currently open Quicken file. Investing accounts will not be imported. Select the .QXF file to import Browse For more on .QXF import, see this help topic.	Back up your data before importing. The import cannot be undone. Back up your Quicken data file before importing the .QXF file.	
3	Continue Cancel	

9. Browse to the location where you saved the Quicken file out of online banking then click Open

Import Web Conn	ect File					×
\leftrightarrow \rightarrow \land \uparrow	> This	PC > Desktop > 🌑	~ 0	Search CSI		Q,
Organize 🔻 Ne	w folder				== -	?
i OneDrive	^	Name	Date modified	Туре	Size	^
This DC		Quicken Transactions	3/12/2019 2:15 PM	Quicken OFX data	8 K	в
			3/11/2019 2:30 PM	File folder		
3D Objects			3/6/2019 5:31 PM	File folder		
📃 Desktop			3/6/2019 7:27 AM	File folder		
Pocumente	¥	ATAA	0/16/0010 0.41 DM	F() = 4 = (2 = -		~
	File nar	ne: Quicken Transactions		✓ Web Connect	t File (*.QFX)	\sim
				Open	Canc	el

10. Click Continue

Q Import .QXF File	×
Import .QXF File	
Import account information from the .QXF file into your currently open Quicken file. Investing accounts will not be imported. Select the .QXF file to import Desktop\CSI\Quicken Transactions.qfv Browse For more on .QXF import, see this help topic.	A Back up your data before importing. The import cannot be undone. Back up your Quicken data file before importing the .QXF file.
•	Continue Cancel

11. Select either Create a new account or Link to an existing account. If linking to an existing account select the account from the drop down. Click Import

Import Downloade	d Transactions	\times
Import Dowi	nloaded Transactions	
People's B	ank of Commerce	
Checking -		
C Create a new acco	ount	
Checking	ecking at People's Bank of Commerce	
	Nickname	
• Link to an existing	account:	
	Checking 🗸	
	,	
Cancel		Import

12. Click Close

Q One Step Update Summary	-		×
🔿 One Step Update Summary			
🔹 One Step Update Complete			
Financial Institutions Updated			
People's Bank of Commerce 3/12/2019 2:23 1 account updated, 20 new transactions pm			
Services updated:			
4 quotes and investing headlines updated			
? 🗹 Show just the last update 🛛 🗌 Show this window only when there are errors		Clos	e

13. To see the items that were just downloaded click the account under Banking on the left menu

All Transactions			
⊿ Banking	\$512		
Checking	512		

14. Review imported transactions

Checking Last download March 12, 2019 - 2:23 pm (Web Connect)						
All Dates Any Type All Transactions Reset						
•		Date	Chec	Payee	Memo	
		2/28/2019		Opening Balance		
New		3/1/2019		Deposit	Depo	
New		3/1/2019		Вр	On-U	

15. Repeat these steps for any other account you wish to import transactions from using online banking