Quicken – Windows – Express Web Connect

Express Web Connect - Setup

Procedure

Task 1: Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Quicken Help**. Search for ***Backup Data file***, and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Quicken Help**. Search for ***Update Software*** and follow the instructions.

Task 2: Connect Accounts to ***Boston Private Bank***

1. Choose **Tools** menu > **Account List.**
2. Click the **Edit** button of the account you want to activate.
3. In the **Account Details** dialog, click the **Online Services** tab.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter ***Boston Private Bank*** in the search field, select the name in the list and click **Next**.
7. If preferred with the Selected Connection Method screen, select **Express Web Connect**.
8. Enter your Digital Banking **Username and Password**. Click **Connect**.

NOTE: We have implemented improved multi-factor authentication for Digital Banking users that initiate account data transmission from Intuit software or digital technologies, utilizing the **Express Web Connect**. Users will be prompted to choose a ***Secure Access Code*** *delivery* point from within the respective Intuit application. Re-authenticating the connection is only required once, provided the user continues to connect from the same device, at the same location. Please contact the Concierge Desk at 888-322-2120 if you have any questions or have issues authenticating your Digital Banking login access.

9. 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 accounts in the drop-down menu.

IMPORTANT: Do **NOT** select **Add to Quicken** unless you intent to add a new account to Quicken. If you are resented with accounts you do not want to track in this data file, select **Ignore – Don’t Download into Quicken**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.

11. Click **Done** or **Finish**.