

Quicken – Windows – Web Connect

Web Connect - Setup

Documentation and Procedures

Task 1: Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up**, select **Backing up data files**, and follow the instructions.
 2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates**, select “Check for Updates,” and follow the instructions.
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Task 2: Generate Web Connect File from *Digital Banking*

- Log in to <https://www.bostonprivate.com/> - *Digital Banking Login*
 - From the Home screen, select the Account
 - Select the Filter icon: choose Custom Date range (Start and End Dates), and other criteria's if applicable.
 - Apply Filters

NOTE: Filtering the date range will download the applied filtered transaction dates.

- Select, Export icon: **Quicken (qfx) Web Connect file**.
 - AccountHistory .qfx file is forwarded to your computer's Download folder
 - Open/Launch file to Quicken or Import the file from Quicken.
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Task 3: Quicken – Transactions Loading

- **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

IMPORTANT:

Do **NOT** select **Create a new account unless you intend to add a new account to Quicken**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.

Task 4: Quicken Import .qfx file instruction (optional)

- Quicken Import file:
 - Open Quicken
 - Click **File > File Import > Web Connect (QFX)**
 - Search and select .qfx file from your computer's Download folder
 - Open .qfx file
 - See Task 3