svb Private

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.

Task 2: Generate Web Connect File from ***Digital Banking***

- https://www.svb.com/private-bank
- ***Login> Digital Banking> For legacy Boston Private Bank Clients***
  - 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.

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