

Quicken for Mac 2015-2017 Instructions

Web Connect

1. Enroll in MoneyView Online banking at www.pvfcu.org.
2. In Quicken, select your account under the **Accounts** list on the left side.
3. Choose **Accounts** menu > **Settings**.
4. Select Set up transaction download.
5. Enter Park View FCU - WC in the **Search** field, select the name in the **Results** list and click **Continue**.
6. Log in to MoneyView Online banking at www.pvfcu.org. **Download** a file of your transactions to your computer.

NOTE: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

7. Drag and drop the downloaded file into the box **Drop download file**.

NOTE: Select "Web Connect" for the "Connection Type" if prompted.

8. In the "**Accounts Found**" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select "**Link**" to pick your existing account.

IMPORTANT: Do **NOT** select "**ADD**" under the action column unless you intend to add a new account to Quicken.

9. Click **Finish**.
10. Repeat steps for each account to be connected.