

Quicken for Windows Instructions

Web Connect

1. Enroll in MoneyView Online banking at www.pvfcu.org.
2. Download your Quicken Web Connect file from within MoneyView Online banking.

NOTE: Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

3. Click **File > File Import > Web Connect File**. Locate and select the Web Connect file to import.
4. **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.

5. Repeat steps for each account to be connected.