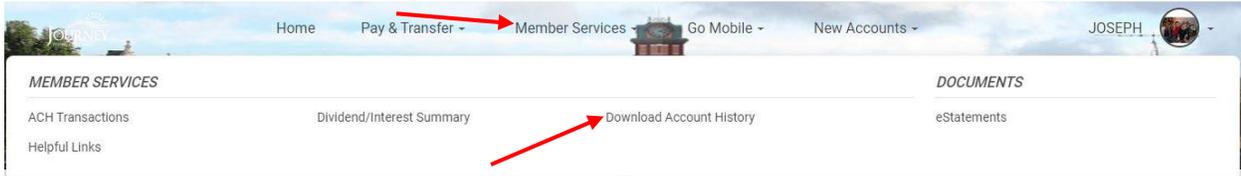


STEP ONE

JFCU Online/Mobile Banking Steps:

1. Log in to your online banking account that you want to download data from.
2. Move the cursor over the Member Services option at the top of the page and select Download Account History.



3. Once Download Account Activity page opens up you will select your options.
 - a. Account of the data you want to download.
 - b. Date range.
 - c. File Format (Quicken 2021 or Newer (.qfx) and QuickBooks (.qbo)).

A screenshot of the 'Download Account Activity' form. At the top, there is a green information box stating: 'Information for "000 JOURNEY SAVINGS" is currently available between 07/07/2022 - 07/20/2023.' Below this, a message says: 'Choose an account, then the range of dates and type of file you'd like to download. Available formats include CSV, Quicken, or Quickbooks.' The form has three main sections: 'Account', 'From Date' and 'To Date', and 'File Format'. The 'Account' dropdown menu is set to '000 JOURNEY SAVINGS'. The 'From Date' and 'To Date' fields are set to '07/07/2022' and '07/20/2023' respectively, and these two fields are circled in red. The 'File Format' dropdown menu is open, showing options: 'Select file format', 'Comma separated values (.csv)', 'Quicken Interchange (.qif)', 'Quicken 2021 or Newer (.qfx)', and 'Quickbooks (.qbo)'. A red arrow points to the 'Select file format' option.

4. Select Download Activity.

STEP TWO

A - Import Data to **Quicken** using a Web Connect file:

1. **File menu > File Import > Web Connect File.**
2. Navigate to, and then select the Web Connect file you just downloaded.
3. Click **OK**.
4. Give the account a name. Or, if you already have an account in Quicken for these transactions, choose **Link** and the account name in the dialog that follows.
5. After Quicken finishes importing the file, open the account. Quicken will either automatically add them to your register, or you can [review and accept](#) the imported transactions, depending on your [downloaded preferences](#).

B - Import Data to QuickBooks using a Web Connect File:

1. From **Banking**, select **Bank Feeds**, then **Import Web Connect Files**.
2. Select the .QBO file you saved, then select **Open**.
3. When asked to select your bank account:
 - **Use a QuickBooks account that exists** if the account you're importing transactions into is already set up in QuickBooks.
 - **Create a new QuickBooks account** if the account you're importing transactions into isn't in QuickBooks yet. **Learn how to create an account**.
4. Select **Continue**. You'll see a dialog box telling you that the data has been successfully read into QuickBooks. Select **OK**.
5. Go to the **Bank Feeds Center** to review your transactions.