How to Connect Your Bank Account to Quicken

As we complete our digital banking system upgrade, you will need to modify your Quicken settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for both Windows, Mac.

Quicken connections will be available starting on August 20, 2024. Your Web Connect files—Quicken (.QFX)—will be accessible from online banking. Please note that Intuit aggregation services (for linking your account to Quicken) will experience interruptions for up to 5 business days after the new online banking platform is available.

To navigate this document, just click the link below that matches your product and connectivity:

Instructions for Downloading a Web Connect file from your Online Banking Site

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Quicken Windows Web Connect

Backup Your Data: (Optional)

1. Backup Quicken Windows Data File and Update.
    a. Choose **File > Backup and Restore > Backup Quicken File**.
    b. Download the latest Quicken Update. Choose **Help > Check for Updates**.
2. Complete a final transaction download.
    a. Complete last transaction update before the change to get all of your transaction history up to date.
    b. Repeat this step for each account you need to update.
    c. Accept all new transactions into the appropriate registers.

Deactivate and Reactivate Your Vermont Federal Credit Union Connection:

1. Deactivate online banking connection for accounts connected to Vermont Federal Credit Union
    a. Choose **Tools > Account List**.
    b. Click **Edit** on the account to deactivate.
    c. In Account Details, click **Online Services**.
    d. Click **Deactivate**. Follow prompts to confirm deactivation.
    e. Click the **General** tab.
    f. Delete Financial Institution and Account Number information.
    g. Click **OK** to close window.
    h. Repeat steps for any additional accounts.
2. Reconnect online banking connection for accounts that apply.
    a. Download a Quicken Web Connect file from Vermont Federal Credit Union's online banking site.
        i. Navigate to the accounts page in Vermont Federal Credit Union's online banking site and select the account with the transactions you want to download.
        ii. Press the download arrow. Choose the .QFX file type.
    b. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
    c. Use the import dialog to select the Web Connect file you downloaded. An “Import Downloaded Transactions” window opens.
    d. Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
    e. Repeat this step for each account you have connected to Vermont Federal Credit Union.

Quicken Mac Web Connect

Backup Your Data: (Optional)

1. Backup your Quicken Mac data file and update the application.
   a. Choose **File > Save a Backup**.
   b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
   a. Complete last transaction update before the change to get all of your transaction history up to date.
   b. Repeat this step for each account you need to update.
   c. Accept all new transactions into the appropriate registers.

Activate Your Vermont Federal Credit Union Connection

Activate online banking connection for accounts connected to Vermont Federal Credit Union

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Vermont Federal Credit Union in the search field, select the correct option and click **Continue**.
5. Log into Vermont Federal Credit Union's online banking site and download your transactions to your computer.
   i. Navigate to the accounts page and select the account with the transactions you want to download.
   ii. Press the download arrow. Choose the .QFX file type.
   Important: 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. **Learn how to fix duplicate transactions here.**
6. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web Connect** for the “Connection Type” if prompted
7. In the “Accounts Found” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, click **Link** to pick your existing account.
   Important: Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken.
8. Click **Finish**.