

This can be found in Quicken's help section.

Tracking expenses and paying bills > Updating your accounts

Update your spending accounts

1. Log in to your financial institution's website.
2. Navigate to the download page and click the Quicken logo or **Download to Quicken**. The exact location of the download page is determined by your financial institution. It is frequently in an area of the website identified as the Download or History area.
3. Your browser will download a *Web Connect* file that contains your account transactions (you can recognize such a file by the .QFX extension in its file name).
4. Return to Quicken and choose **File menu > File Import > Web Connect File**.
5. Navigate to, and then select the Web Connect file you just downloaded.
6. Click **OK**.
7. 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.
8. 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](#).

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Change Web Connect download options

[▼ About changing Web Connect statement download options](#)

If you use the [Web Connect](#) method to update transactions and balances from your financial institution, you can change settings that determine whether the data is saved as a separate file or entered directly into Quicken, and whether Quicken should stay open or automatically close after receiving the downloaded data.

Choose **Edit menu > Preferences > Web Connect**.

In the Web Connect Options window, change the appropriate options:

[▼ Give me the option of saving to a file whenever I download Web Connect data](#)

- Select this check box to have Quicken save updated [Web Connect data](#) as a file on your hard drive.
- Clear this check box to have your Web Connect data entered directly into your Quicken data file.
- Note: Some browsers do not allow a program, such as Quicken, to directly open an encrypted downloaded file. If you find this to be the case with your browser, save the Web Connect file to your hard drive and then import it by choosing **File menu > File Import > Web Connect File**.

[▼ Keep Quicken open after the Web Connect completes](#)

- Select this check box to have Quicken stay open after receiving Web Connect data, if Quicken is launched by the browser.
- Clear this check box to have Quicken close after receiving Web Connect data, if Quicken is launched by the browser.