

Uploading transactions from Online Banking to Quicken

1. Log into Online Banking. Downloads are not available in the mobile app.
2. Click into the account you would like to download.
3. Locate and click the Download icon, see screenshot below.



● **REWARDS HIGH YIELD CHE...** Current Balance Available Balance

0002 \$83.67 \$83.67

Transactions **Account Details**

Sort By: Default

DATE	DESCRIPTION	AMOUNT	BALANCE
JUN 4 2025	Withdrawal Faste ZEL* Ramon Hernandez JNL09JQH75 <input type="text" value="Add a category"/>	-\$1.11	\$83.67

4. After clicking that icon, you will be presented with a window to select type of download. For Quicken please use the OFX file type.

5. You may also select the range of dates and additional accounts to include.

Download Transactions

You may download account information to your desktop and/or qualified accounting system using one of the format options listed in the drop-down below. Please choose your preferred download option, the dates you wish to download as well as the account(s). Press the Download button at the bottom of this screen to begin the downloading process.

Download Options

Download Format

Select

- CSV (Comma-Separated Values)
- OFX (Open Financial Exchange)**

Notice: You are unable to download transactions which are older than two years in age.

End Date

06/04/2025

Select Accounts

Search

Select All

<input checked="" type="checkbox"/>	REWARDS HIGH YIELD CHECK... 0002	\$83.67
<input type="checkbox"/>	Hi Yield Share ****960-0001	\$0.00
<input type="checkbox"/>	Regular Savings ****820-0001	\$0.00

Download

Cancel

6. Once you have made your selections click the Download button.