Peace Officers Professional Associations Federal Credit Union

How to link QFX format files in Quicken:

- Open Quicken with your accounts added.
- Go to Tools and click on Account List.
 Quicken 2014 Premier 0163's Quicken Data [Home]

4 4 1	Account List	Ctrl+A	
Accounts All Transactic	Add Account Calendar Alextr Canter	Ctrl+K	Planning
 Banking SHARE DRAFT- 	Manage Bill & Income Reminders Manage Hidden Accounts	Ctrl+J Ctrl+Shift+M	
REGULAR SHAR	Category List Tag List	Ctrl+Shift+C Ctrl+L	
	Security List	Ctrl+Y	3 - 10/2013)

• Account List window should pop up and click edit next to the account(s) you want to use.

Account Name		Transaction Download 🙂	Current Balance
Spending			
SHARE DRAFT-CHECKING XXXXXX862-S10 D	[Edit]	Yes (Express Web Connect)	3.77
Savings			
REGULAR SHARES XXXXXX862-S00 D	Edt	Yes (Express Web Connect)	10.00

- After you click on edit, a new window will show up and click on Online Services tab.
- In the Online Services tab, click on Deactivate button to deactivate the account and click yes after that.

count Details	
ccount Details	
General Online Services Display Options	
Online Setup	

Q Quick	en 2014	5 m
?	Would you like to deactiv	vate this service?
	No.	

• After your account(s) have been deactivated. Go to <u>www.popafcu.org</u> and login to your account.

My Accounts		Transfers -	Financial Management	+ Mortgage +	Alerts -	eStat
Search Trans	actions:		Search	How do I search?	Recent searches	<u>s</u>
Account	Summary					
Options	Options 📝 Edit 🥱 🎯 🥹					
Deposit Ad	counts					
Actions	Account	Туре	Number	Available	Balan	се
🖂 🚖 🔯	1 REGULAR SHARES	Savings	XXXXXXX862-S00	\$0.00	\$10.0	00
🔯 🚖 🖂	3 SHARE DRAFT/CHECKING	Checking	XXXXXXXX862-S10	\$3.77	\$3.7	77
Deposit Accounts – Sub Total:					\$13.7	77
Account S	ummary Total					
				All Accounts Total:	\$13.	77

• After that click on Options on the Account Summary screen and click on Download to Quicken - QFX

Account Summary

Options 🔯 Edit
Thow only favorite Accounts
Show Assets and Liabilities
😘 Upload Accounts from another Institution
潯 Download to Money - OFX
🕞 Download to Quicken - QFX

- Download Quicken QFX file screen will show up.
 - $\circ \quad \text{Select the Start Date you need} \\$
 - o Select the End Date you need
 - o Select the account you want or All Accounts

- And click on the Download button.
- You will download a QFX format file. Double-click on the file to open it.

Download to Quicken – QFX File				
Cancel				
Start Date :	04/19/2013 Shortcuts: today 10 days ago 30 days 60 days 90 days 180 days clear			
End Date :	10/16/2013 Shortcuts: today 10 days aqo 30 days 60 days 90 days 180 days clear			
Accounts :	- All Accounts			
NOTE:	 The default download range is the last 180 days. Downloading transactions that overlap with a previous download is ok. 			
	Download Cancel			

- After the file open up it will give you two options
 - o Create a new account, or
 - o Link to an existing account (and choose the account you want to link to) and click import
 - o If multiple accounts, click import each time asked.

Import Downloaded Tr	ransactions	X		
Import Down	loaded Transactions			
POPA Federal Credit Union				
Savings - 0000021862	-\$0000			
C Create a new account	t			
Savings 🗾	Savings at POPA Federal Credit Union			
	Nickname			
• Link to an existing acc	ount:			
	REGULAR SHARES XXXXXX862-S00 💌			
? Cancel		Import		

• After the imports, all the transactions will show up without any repetition.

System will as for your online banking credentials. Input user name, password and secondary password as prompted. System will now setup your account.