

## Using Quicken™ with CU OnLine!

Intuit offers two methods of importing financial institution information into Quicken: **Direct Connect** and **Web Connect**. Direct Connect lets you update your account information without first logging onto CU OnLine. LBS Financial Credit Union offers Web Connect.

Quicken WebConnect provides you with an intelligent import of your account information. In CU OnLine, click on any account to open the Account Detail page. On the left, click on "Export Account Information". Select the account, date range (not required for Money Active Statements) and the export type. Then click "Export". For Quicken and Money exports, your software will automatically open. Follow the instructions provided by your software. Please be advised that LBS Financial Credit Union cannot provide technical support for Quicken or Money. Please contact Intuit or Microsoft.

### Other Export Options

The other export options create a download file. You will be prompted to save the file. Remember the location you choose because you will need locate the file on your computer's hard drive in order to use it with the software of your choice.

- CSV is a special text format for importing data into database and spreadsheet software such as Excel.
- QIF was discontinued by Intuit because the format is not an intelligent import. Data is imported without regard for what's already in Quicken and may result in a large number of duplicate entries. It is not supported in Quicken versions 2005 and later.
- Text File (.dat) exports can be opened by a variety of software. Most users will want to right-click the file and choose "Open With" and select an application like Notepad or Wordpad.

### Account History Availability

CU OnLine gets account history from LBS Financial Credit Union's main computer system. For share draft check and share savings accounts, we retain the most recent 6 months of account history. There is no electronic option for obtaining account history older than 6 months.