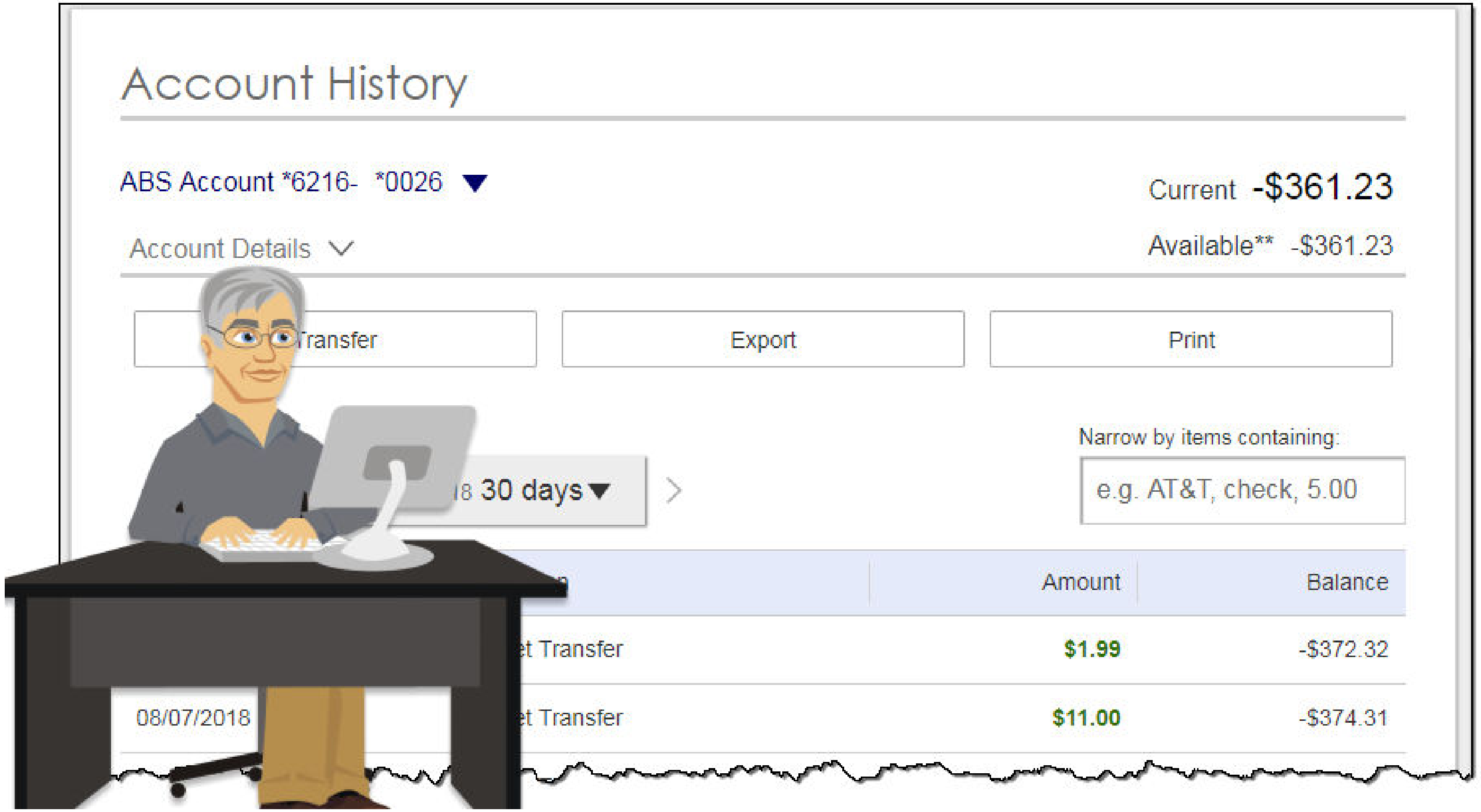
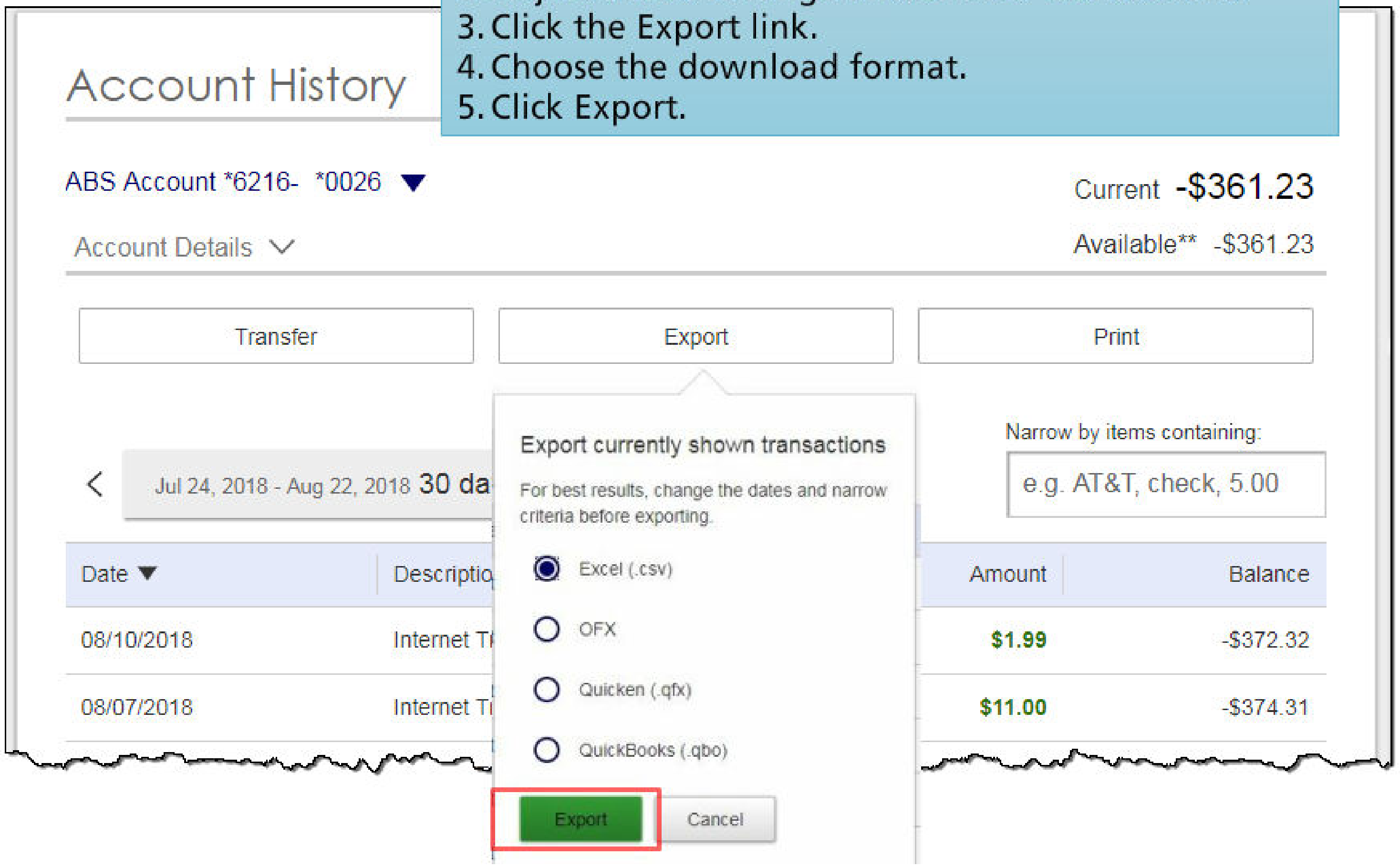
Account Details

Ben called you earlier and now understands the basics of Web Connect. He's now ready to download transactions. He simply logs into Online Banking and accesses the details screen for his checking account.



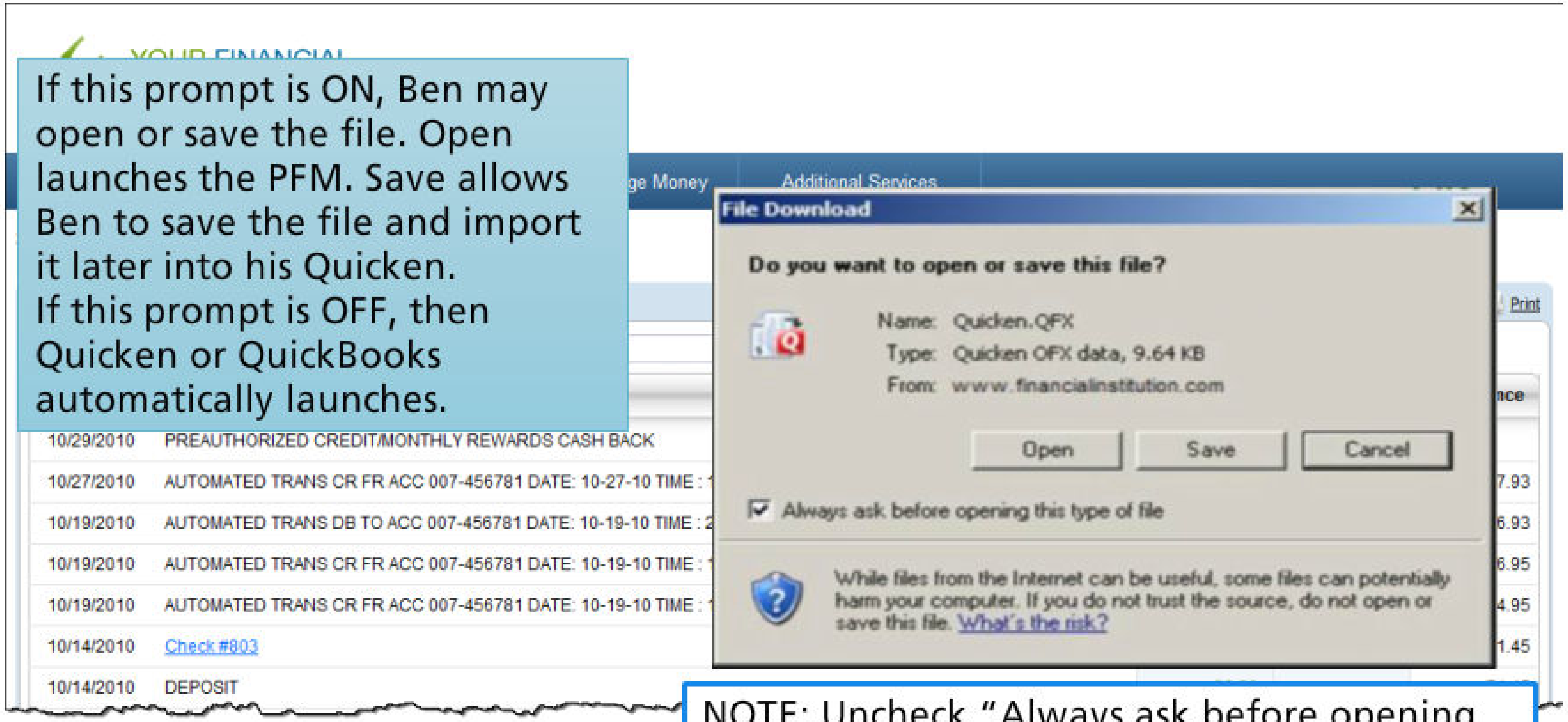
Export Steps on Account Details

Steps to initiate a download:
1. Select an account on the My Accounts screen.
2. Adjust the date range and/or filter transactions.
3. Click the Export link.
4. Choose the download format.
5. Click Export.



File Download Prompt

Upon clicking Export, Ben may see this File Download prompt; this prompt is controlled by the local machine folder options.



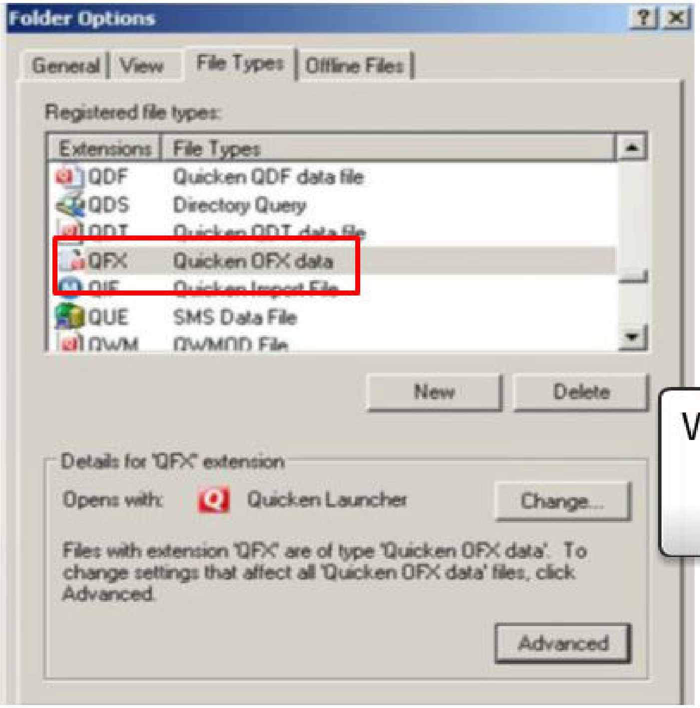
If this prompt is ON, Ben may open or save the file. Open launches the PFM. Save allows Ben to save the file and import it later into his Quicken.
If this prompt is OFF, then Quicken or QuickBooks automatically launches.

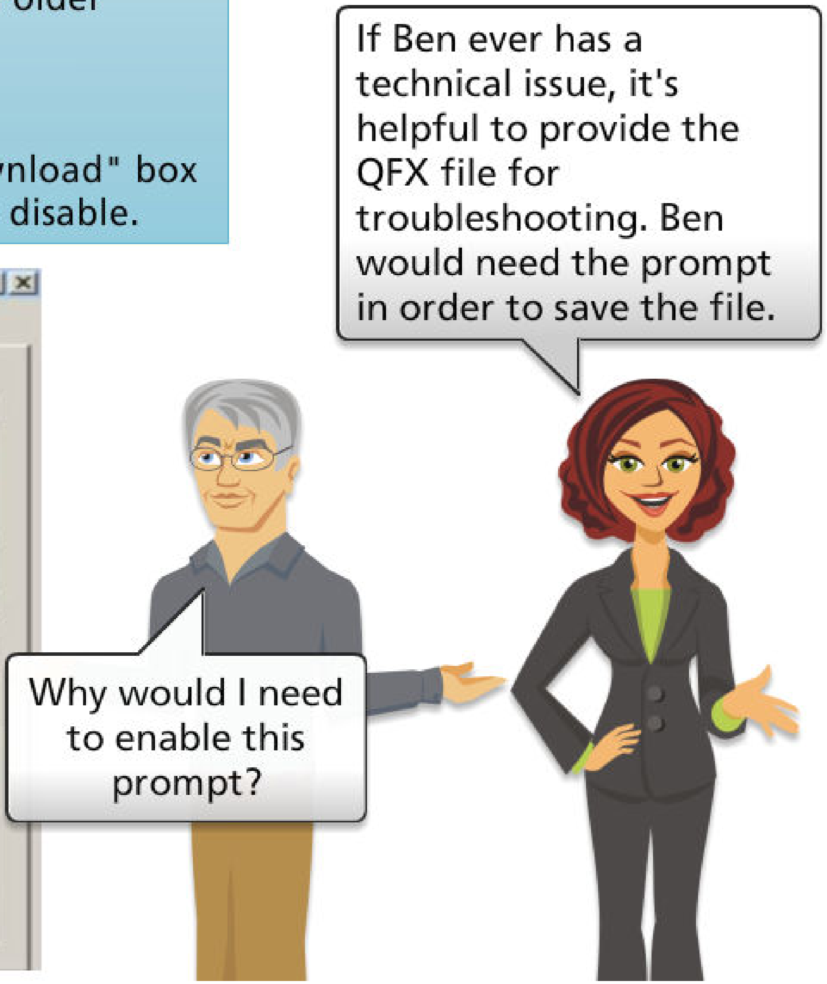
NOTE: Uncheck “Always ask before opening this type of file” to turn off this prompt.

Enable Download Prompt

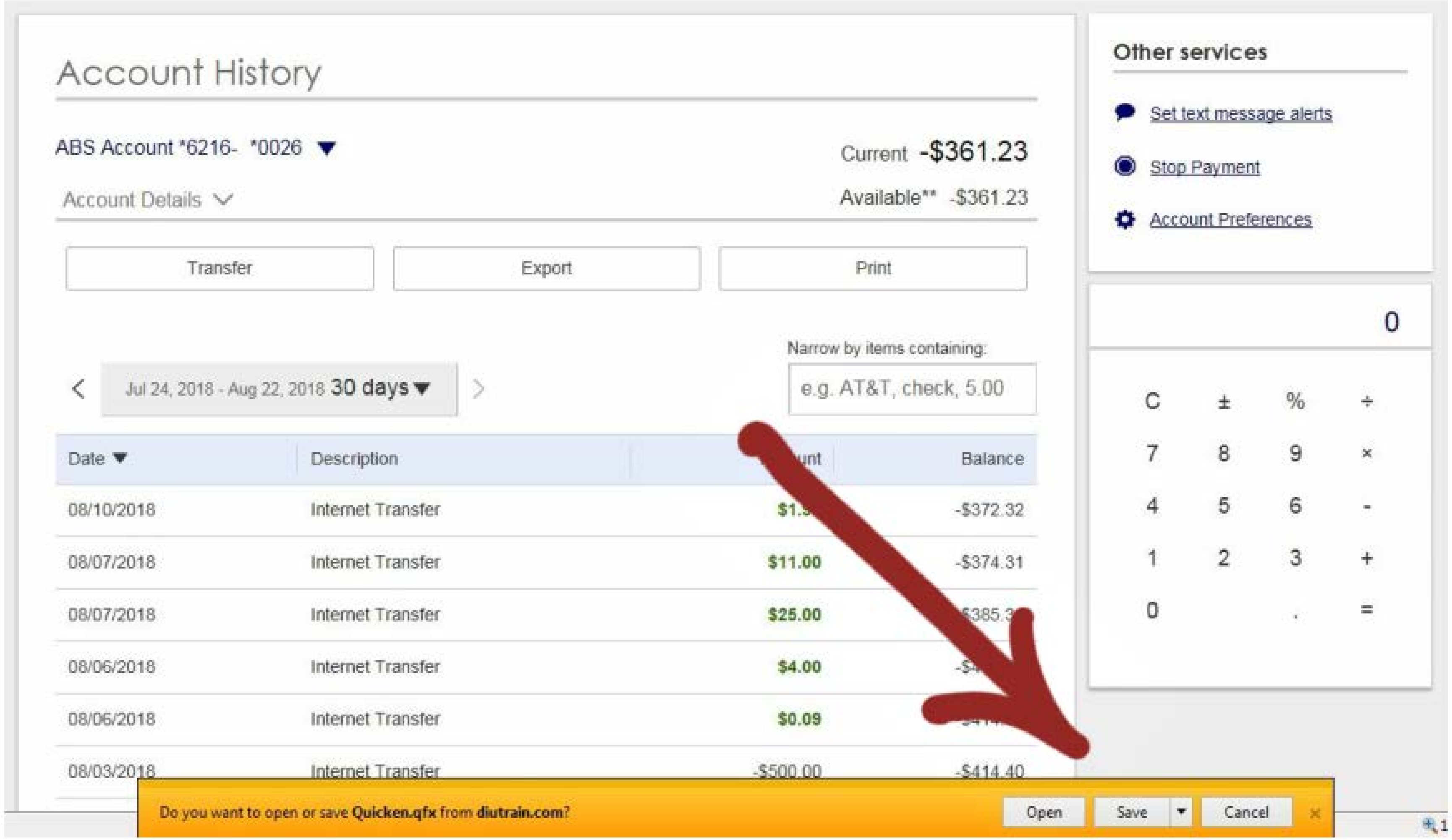
To activate/deactivate this prompt:

1. Go to the Windows Control Panel > Folder Options > File Types.
2. Highlight QFX or QBO extension.
3. Click Advanced.
4. Check the "Confirm Open After Download" box to enable the prompt, or uncheck to disable.





Once the browser and computer settings allow the download to happen, Quicken or QuickBooks opens. The steps within the PFM are covered in the next modules.



To learn the user experience in the PFM, visit fi.intuit.com for training and materials.