

Exporting Transaction Data into Quicken

To export transactions from RTN Federal Credit Union's Online Banking system to Quicken

- Sign into Online Banking on www.rtn.org
- Once signed in, click on the account you want to download data from

The screenshot shows the 'My Accounts' page with a table of accounts. The 'Basic Checking/2' account is highlighted with a red circle.

Accounts	As Of	Balance
12 MONTH Roth IRA CERT/15	02/25/2008	\$5,676.35
36 MONTH SHARE CERT/20	02/25/2008	\$4,192.88
Basic Checking/2	02/25/2008	\$491.66
12 MONTH SHARE ACCOUNT-9/10	02/25/2008	\$110.28
Main Share/1	02/25/2008	\$263.18
Money Market Acct/3	02/25/2008	\$0.10

Loan Accounts	As Of	Balance
Credit Card/205	02/25/2008	\$0.00
Overdraft Protection-92/143	02/25/2008	\$0.00

- Once the Account Details are displayed, click on *Export Account Information* in the left column

The screenshot shows the 'Account Details' page for the 'Basic Checking/2' account. The 'Export Account Information' link in the left sidebar is circled in red.

Account: Basic Checking/2

Current Account Information	As Of	Balance
Current Balance	02/25/2008	\$491.66
Available Balance	02/25/2008	\$491.66
Amount of Last Deposit	02/22/2008	\$30.61
Year to Date Dividends	02/25/2008	\$0.00

Summary Information	
Is this a fee account?	No
Is this a bill pay account?	Yes
Prior Year Dividends	\$0.00

Date	Id	Description	Amount	Fee	Balance
02/22/2008		TRANSFER	-\$2.00		\$491.66

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- Fill in the *Select Account*, *Beginning Date*, *Ending Date*, and *Export To* (being sure to choose *Quicken Using Web Connect (QFX)* or *QIF*) fields and click *Export*

The screenshot shows the RTN Federal Credit Union website interface. The main content area is titled "Export Account Information". It contains the following text: "You can export your account information and save it to a file to use with other computer programs. Choose the account to drop-down list. Enter a Beginning Date and an Ending Date. Choose the product or file format, then click **Export**. There is no need to enter a date range for an Active Statement download. A QIF download does require a date range." Below this text is a form with the following fields: "Name on Account" (JOSEPH CONNORS), "Select Account" (Basic Checking/2), "Beginning Date (mm/dd/yyyy)" (02/01/2008), "Ending Date (mm/dd/yyyy)" (02/24/2008), and "Export To" (Quicken Using Web Connect (QFX)). At the bottom of the form are "Reset" and "Export" buttons. A red circle highlights the "Export" button.

- Select *Open with Quicken Launcher* in the pop-up dialogue box (or *Save to Disk* to open in Quicken at another time) and press *OK*

The screenshot shows the RTN Federal Credit Union website interface with a pop-up dialog box. The dialog box is titled "Opening BasicChecking2-20080225.qfx" and contains the following text: "You have chosen to open BasicChecking2-20080225.qfx which is a: Quicken QFX data from: https://cuolraycu.com". Below this text is a section titled "What should I do with this file?" with two radio buttons: "Open with: Quicken Launcher (default)" (selected) and "Save to Disk". At the bottom of the dialog box are "OK" and "Cancel" buttons. A red circle highlights the "OK" button.

- If you choose *Open with Quicken Launcher*, the Quicken software will be launched and the transactions imported into your records.