

## **Quicken® & Microsoft Money® Download FAQ**

**Updated on 4/2/08**

### **How do I download my account transactions from Ubuy@Home into Quicken® or Microsoft Money®?**

UBCCU does not presently support the automatic or seamless integration of your UBCCU account information into Quicken® or Microsoft Money®.

To import your UBCCU account information into Quicken® or Microsoft Money®, log into Ubuy@Home and click on the History tab then click the Quicken/Money History Download link on the left part of the screen.

At this following screen chose the format you wish to download. The QIF format is used by Quicken® 2004 and older while the Quicken Webconnect is for 2004 and newer versions of Quicken®. The MS Money OFX file format is support by all versions of Microsoft Money®. Finally, the comma delimited format is for advanced users who wish to import the file into another application.

For more in-depth support help with Quicken® go to <http://www.intuit.com/support/> and for more in-depth support help with MS-Money® go to <http://www.microsoft.com/money/support/>



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The screenshot shows a web browser window with the URL <https://www2.webcu.org/cgi-bin/ncw080.cgi?TRANQ&NDOWNLOAD0018C0A4C41F01CD0C20BF80C4E7E8623A51F43DA65182>. The page features the United Bay Community Credit Union logo and a Visa logo with the text "and a generous credit limit". A navigation menu includes "Account Balances", "History", "Recent Activity", "Transfers", "Withdrawals", "Bill Payment", "Loan Options", "Draft Options", "Year to Date", and "Other Options".

### Quicken/Money Download

Select the source ID:


Enter the transaction begin date:


Enter the transaction end date:

Select desired file format:

- MS Money CFX
- Quicken WebConnect
- Comma Delimited File
- QIF

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Done www2.webcu.org

**I have tried everything in the FAQ and I still can't get Ubay@Home to work. What do I do next?**

Please call our Call Center at (989) 892-4597 or (800) YOUR-OWN if your problems are not resolved or you need further assistance.