

Instructions for Downloading Account History into Quicken or Microsoft Money.

Please make sure you have already installed Quicken or MS Money before attempting to download your account history. Please contact Microsoft or Quicken if you are having problems with the software. This document simply explains how to export or download your account history into Quicken or MS Money.

1. Log into internet banking with your account number and password.
2. Click on Account Access in the upper left corner. You will see a list of all your accounts.
3. Click on the particular account that you would like to download into Quicken or MS Money. You can not download your savings and checking history at the same time. You have to download the history one account at a time. If you are interested in downloading your checking history, click on the share draft account. You will now see a screen displaying the history of that account.
4. Make sure you are looking at the correct date range. If you need to change the date range, scroll to the bottom of the account history page to where you see the option, "Next History Date Range: (same account)." You can enter a date range and click on More History.
5. Once you have the Account History for the correct date range displayed, scroll down to where it says, "**Export.**" There is also an area to change the date range here if you need to. Below the date range you will see a drop down list with the different download formats. If you would like to download your history into Quicken select, "**Quicken Financial Exchange (QFX).**" If you would like to download into Microsoft Money select, "**MS Money (OFX).**" Once you have selected a format you need to click on "**Download Data.**"
6. After you have clicked on "**Download Data**" the Quicken or MS Money software will open automatically. The software will ask you if you would like to download the history into an existing account or if you would like to create a new account. The software will walk you through the rest of the setup at this point. Please also keep in mind that the furthest back you can download from is 6 months.
7. When you are finished using Quicken or MS Money, and finished downloading your account history please remember to log out of internet banking.

Additional Notes:

- BME FCU is listed as a supported financial institution on both the Quicken and MS Money web site. On the Quicken web site BME FCU is listed as, "BME Federal Credit Union." On the MS Money web site BME FCU is listed as, "Boulder Municipal Employees FCU."