

How to link your Bank of Hawaii (BOH) account to Quicken Classic

Please see below for instructions provided by Intuit to reconnect your Bank of Hawaii accounts to **Quicken Classic**. You can link your Bank of Hawaii account in two ways:

- 1) Logging in with your username and password via [Express Web Connect](#), OR
- 2) Downloading transactions directly from your Bank of Hawaii online banking account and then uploading the file via [Web Connect](#)

Quicken Express Web Connect

1. Deactivate online banking connection for accounts connected to the financial institution that is requesting this change.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Financial Institution and Account Number information. Click **OK** to close window.
 - g. Repeat steps for any additional accounts that apply.
2. Reconnect the online banking connection for your accounts.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account you want to activate.
 - c. In Account Details, click **Online Services** and then choose **Set up Now**.
 - d. Type **Bank of Hawaii** in the search field, select **"Bank of Hawaii"** and click Next.
 - i. Please **DO NOT** select **"zz-Bank of Hawaii"** as this option is for the old platform. Once all BOH customers have migrated to the new platform, this old option will be removed.
 - e. Enter your Bank of Hawaii login credentials.
 - i. **Express Web Connect uses the same credentials you use for your Bank of Hawaii login credentials.**
 - f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu.

Important: Do NOT choose "Create a new account" unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, choose **Ignore – Don't Download into Quicken** or click **Cancel**.
 - g. After all accounts have been matched, click **Next** and then **Done**.

Quicken Web Connect (PC/Windows)

1. Deactivate online banking connection for accounts connected to financial institution that is requesting this change.
 - a. Log into your **Quicken Web Connect** account.
 - b. Choose **Tools > Account List**.
 - c. Click **Edit** on the account to deactivate.
 - d. In Account Details, click **Online Services**.
 - e. Click **Deactivate**. Follow prompts to confirm deactivation.

- f. Click the **General** tab.
 - g. Delete Financial Institution and Account Number information.
 - h. Click **OK** to close window.
 - i. Repeat steps for any additional accounts.
2. Reconnect online banking connection for accounts that apply.
 - a. Download a **Quicken file** from your Bank of Hawaii's online banking account.
 - i. Log into your Bank of Hawaii online banking account → click on your deposit account from the dashboard → click on the **Download** button → under **Download Transactions**, click on **Quicken** → Select data range → Click on **Export**
 - b. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
 - c. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
 - d. Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
 - e. Repeat this step for each account you have connected to this institution.

If you are prompted to select a financial institution, please select "Bank of Hawaii"

Quicken Web Connect (Apple/Mac)

Activate online banking connection for accounts connected to financial institution that is requesting this change.

1. Log into your **Quicken Web Connect** account.
2. Select your account under the Accounts list on the left side.
3. Choose **Accounts > Settings**.
4. Select **Set up transaction download**.
5. Type **Bank of Hawaii** in the search field, select "**Bank of Hawaii**" and click Next.
 - a. **Please DO NOT select "zz-Bank of Hawaii" as this option is for the old platform. Once all BOH customers have migrated to the new platform, this old option will be removed.**
6. Log into your financial institutions online banking site and download your transactions to your computer.
 - a. **Important: Take note of the date you last had a successful connection.** If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.
7. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web Connect** for the "Connection Type" if prompted.
8. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, click **Link** to pick your existing account.
 - a. **Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.**
9. Click **Finish**.

For additional resources, please refer to Quicken's website:

- [Deactivate and Reactivate Online Banking Services for a Quicken Account | Quicken](#)
- [How do I import data into Quicken for Windows? | Quicken](#)