



Getting Started with Transaction Downloading in Quicken 2004

Refer to this guide for instructions on using Quicken's online account services to save time and automatically keep your records up to date.

This guide includes the following sections:

Creating a New Quicken Account, page 2—Explains how to use Express Setup to create a new Quicken account for downloading transactions and paying bills online.

Keeping your Quicken Accounts Up-to-Date, page 4—Explains how to download transactions or make payments with accounts that you have activated for online account services.

Information You'll Need to Get Started

To download your transactions with Quicken, you must have Internet access. In addition, to complete setting up your Quicken accounts for transaction download or online bill payment services you will need to enter a Customer ID and PIN.

Your Quicken Customer ID/PIN is the same as your Ent Account Number and PIN used to log on to Online Banking or Telephone Banking.

This guide will show you how to setup and download your accounts. For step-by-step help with an online task, choose **Learn About Downloading Transactions** from the Quicken **Help** menu.

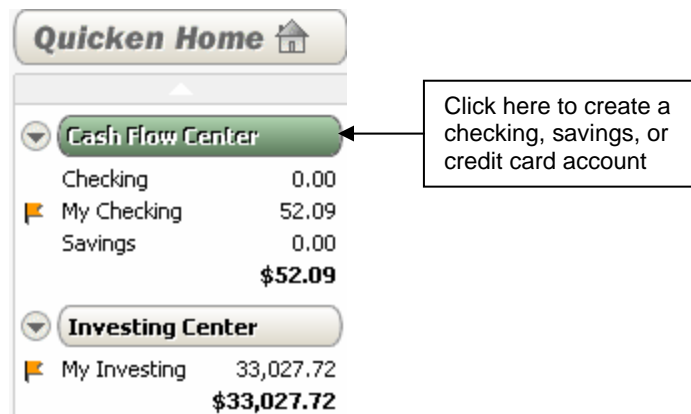
Important: First, get the latest program updates!



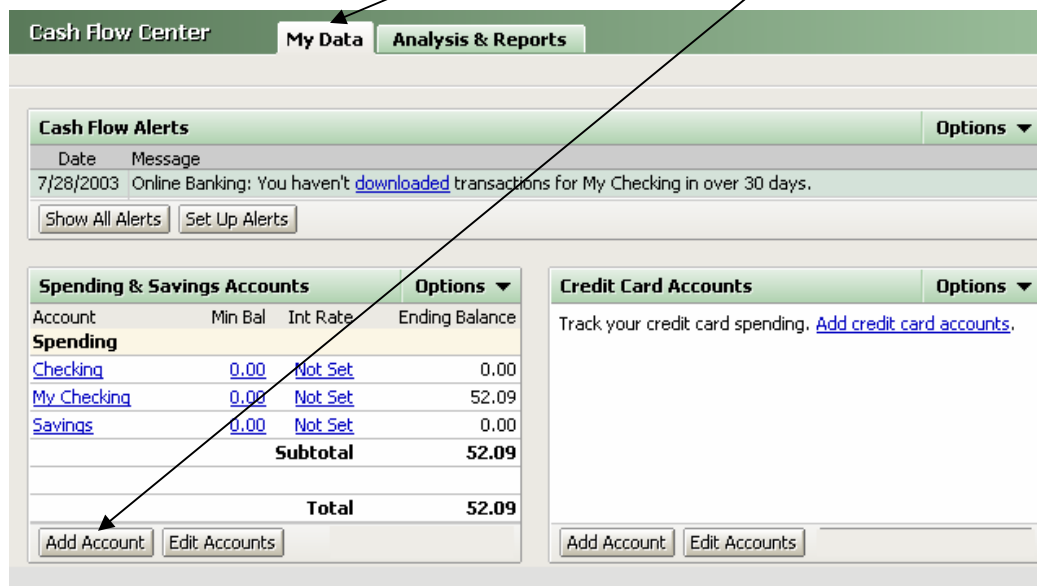
To get the latest directory of participating financial institutions and program updates click **Update** on your Quicken toolbar. In the dialog, click **Update Now**, Quicken will automatically check for available updates. When this download process is complete, **exit** and **restart** Quicken.

Creating a New Quicken Account (Using Express Setup)

Step 1 From the Account Bar, click **Cash Flow Center**.



Step 2 In the Cash Flow Center, click the **My Data** tab and then click **Add Account**.



Step 3 Enter Ent in the financial institution selection dialog and click **Next**.

Step 4 Click **Next** to accept the **Online** option in this dialog. Note, that you can download any of the account types listed under **Download Availability**.

Step 5 The next dialog asks for your **Customer ID** and **PIN**, enter this information. If you're unsure about which ID/PIN to use, see the information under "Need a Customer ID and PIN?" to the right in this dialog. Click **Next**.

Step 6 Specify a Quicken account name, or use an existing Quicken register if you are presently manually entering transactions. Click **Next** when you have specified how Quicken should handle each online account.

The screenshot shows the "Quicken Account Setup" dialog box. At the top, it says "Quicken detected the following account(s) at Federal Credit Union. Enter a name for each account you would like to add into Quicken." Below this is a table with two columns: "Federal Credit Union Account" and "Quicken Account Name". There are three rows, each with a checked "Add" checkbox, an account name, and a text input field for the Quicken name. The first row is "Savings, 50009787-01" with "My Savings" in the input field. The second row is "Money Market, 50009787-02" with "My Money Mar" in the input field. The third row is "Checking, 50009787-09" with "<enter a name>" in the input field. At the bottom of the dialog are "Cancel", "Help", and "Next" buttons. Three callout boxes provide instructions: one on the left points to the "Add" checkboxes, one on the right points to the "Quicken Account Name" input fields, and one at the bottom right points to the "Next" button.

Federal Credit Union Account	Quicken Account Name
<input checked="" type="checkbox"/> Add Savings, 50009787-01	My Savings
<input checked="" type="checkbox"/> Add Money Market, 50009787-02	My Money Mar
<input checked="" type="checkbox"/> Add Checking, 50009787-09	<enter a name>

To ignore the selected online account, click the **Add** checkbox. Quicken will not download transactions from this online account

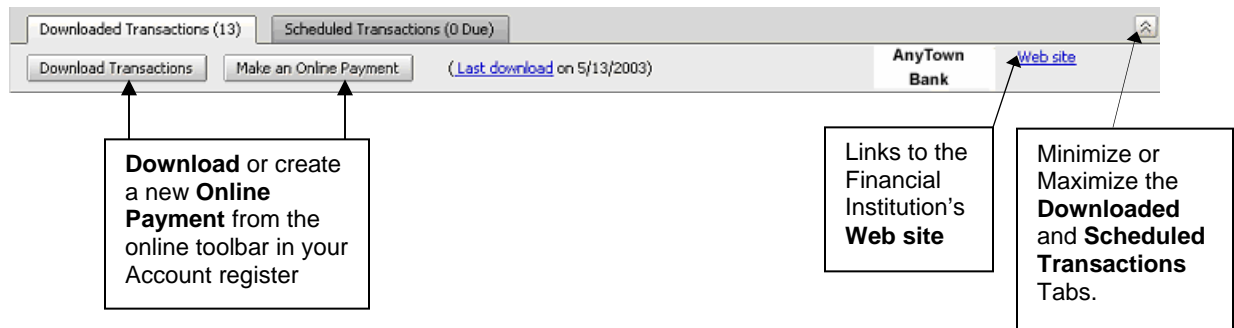
Simply name each account that you'd like to add to Quicken

... then click **Next**

Step 7 Click **Next** to create all the account registers and download transactions into Quicken. Congratulations! For instructions on downloading account information on an on-going basis, see the "Keeping Your Quicken Accounts Up-to-Date" section.

Keeping your Quicken Accounts Up-to-Date

- Step 1** To download transactions or send online payments directly from your account register, go to the account via the account bar, and then click **Download Transactions** located at the bottom of your account register.
- Step 2** Follow the on-screen instructions to complete downloading transactions.



Updating Accounts from the Online Center

The **Online Center** also lets you easily download transactions to or make payments from the accounts that you have activated for online account services.

Easy Access: From the **Online** menu, select **Online Center**.

