Connectivity Getting Started Guide
Quicken for Windows

Intuit Financial Data Platform Professional Services Group

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Quicken for Windows Getting Started Guide

Thank you for choosing Quicken!

About this Guide

This guide helps you get started with Quicken as quickly as possible. You'll learn:

- What you will need to get started
- How to set up an account for online banking (Direct Connect)
- How to set up an account for online banking (Web Connect & Express Web Connect)
- How to update an account setup for online banking
- How to set up Bill Pay (Direct Connect-only)

Features in Quicken for Windows

Quicken maintains the same online banking connectivity features, along with these notable features:

- Manage money on the go across desktop + web + mobile
- Easily export your data directly to Excel
- Compare buy-and-hold options with improved portfolio analysis
- Pay your bills in Quicken for free using Quicken Bill Pay with Quicken Premier version
- Priority access to customer support with Quicken Premier version
- Create and e-mail custom invoices and estimates with Quicken Home & Business
- Add payment links directly to invoices with Quicken Home & Business
- Save rental documents directly to Quicken with Quicken Home & Business

Before You Connect

Before you set Quicken to download transactions you may need to contact your financial institution (FI) for the following information:

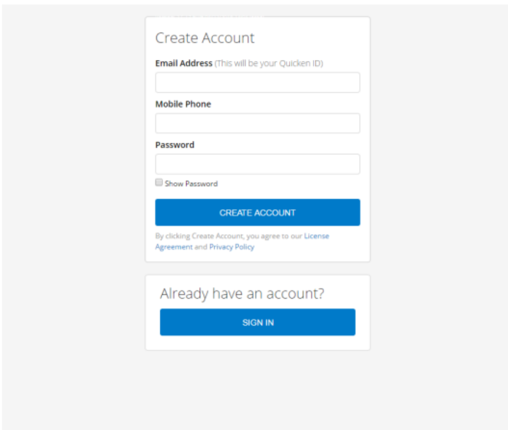
- Customer ID
- Personal Identification Number (PIN) or password

For Quicken Web Connect/Express Web Connect accounts, use the same customer ID and PIN/password as your financial institution website. For Direct Connect, they may be different. Please contact your financial institution to verify your Direct Connect login information.

IMPORTANT: We recommend that you back up your Quicken Data File before setting up online banking accounts for the first time. Choose **Help > Quicken Help** and search for ***Back Up*** for backup instructions.

Register a Quicken Data File with a Quicken ID

When you set up an account for online banking, Quicken requires you to link your Quicken data file to a Quicken ID. If you don't currently have a Quicken ID, you will need to create one.



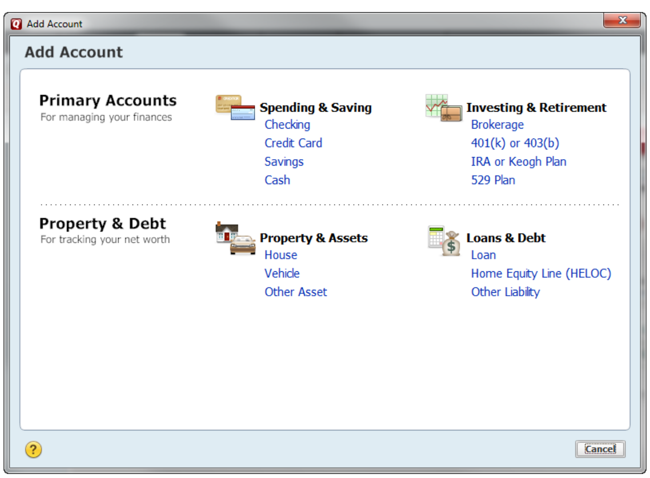
Fill in the information to set up your Quicken ID and link your data file.

If you already have a Quicken ID, click **SIGN IN** under "Already have an account?" and sign in.

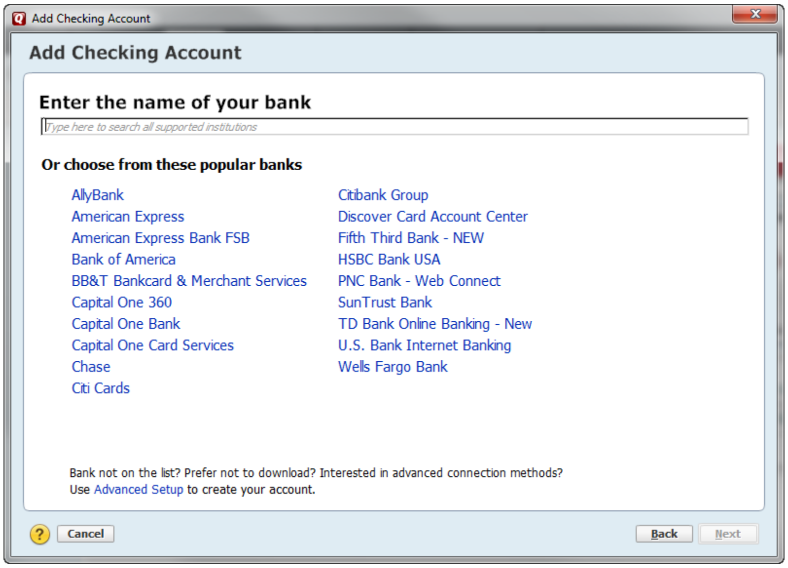
Set Up an Account for Online Banking (Direct Connect)

1. Choose **Tools > Add Account....**

2. Click the type of account you want to set up.



3. After you choose the type of account you want to add, you will see the financial institution selection screen. Type the name of your financial institution to filter the list.



4. When your financial institution name appears in the filter results, click it and click **Next**.

5. Be sure to select the correct financial institution, because some financial institutions may appear more than once. If you have any questions about which listing to choose for Direct Connect, please contact your financial institution.

6. Quicken will now display a login screen: type your Direct Connect credentials and follow the prompts to add your accounts to Quicken.

Set Up an Account for Online Banking (Web Connect)

1. Log into your financial institution's web site.

2. Download your transactions according to your financial institution's instructions.

3. If you are given a choice for your download format, choose "Quicken Web Connect (*.QFX)" and save the file to your computer.

NOTE:	These instructions assume you will save the download to your computer. If you "open" it instead, your web browser should open Quicken and begin to import the transactions. If you plan to open the file directly, we recommend that you have your Quicken data file open in Quicken before you begin Step 2.

4. Open Quicken, then choose **File > File Import > Web Connect File....** You will see an import dialog.

5. Navigate to and select the file you downloaded in Step 2, then click **Open**.

6. Click **Link an Existing Account** if you have an appropriate account in the account list. If you don't have an account yet, click **Create a new account** and enter a nickname for that account.

7. Click **Import**.

8. Click **OK** to confirm and finish.

Set Up an Account for Online Banking (Express Web Connect)

1. Choose **Tools > Add Account....**

2. Select the type of account you want to set up.

3. After you select the type the name of account you want to add, you will see the financial institution selection screen. Type the name of your financial institution to filter the list.

4. When you see your financial institution's name in the filter results, click it and click **Next**.

5. Quicken will now display a login screen: type the credentials you use to log in to your financial institution's website and follow the prompts to add your accounts to Quicken.

NOTE:	During the Express Web Connect setup, you might be asked to enter your Multi-Factor Authentication information. This could be a series of security questions, a one-time passcode, etc.

Updating Accounts: The One Step Update

After an account has been set up for online banking, you can use One Step Update to update information:

1. Choose **Tools > One Step Update....**

2. Enter the necessary information for the listed accounts (such as passwords or user ID) and click **Update Now**.

3. Follow the instructions to update your accounts.

Set Up Bill Pay (Direct Connect)

Some financial institutions offer Direct Connect subscribers the ability to send payments directly from within Quicken. If your financial institution offers Bill Pay services, this feature is activated during the Direct Connect account setup.

NOTE:	Contact your financial institution if you have any questions about Bill Pay enrollment processes and capabilities.

Adding an Online Payee

Sending online payments with Quicken is a fast and easy way to pay your bills. Just add the payment to the Online Payee List once; all Quicken accounts share this list.

1. Choose **Tools > Online Center**.
2. Choose your financial institution from the drop-down list.
3. Select the Payments tab, type your payee's name in the Payee field, and press the TAB key.
4. In the Set Up Online Payee window, enter your payee's contact and account information, then click **OK**.
5. Review the information on the Confirm Online Payee Information dialog, then click **Accept** to continue (if you need to edit the information, click **Cancel** and make any changes).

Creating an Online Payment

After you have added your online payees, you are ready to create an online bill payment.

1. Choose **Tools > Online Center**.
2. Choose your financial institution from the drop-down list.
3. Select the Payments tab and type your payee's name in the Payee field.
4. Fill in the remaining fields for the payment that you wish to make (payment amount, processing or delivery date, category, and memo) then click **Enter**.
5. Click **Update/Send…** to send your payment.