

GETTING STARTED WITH QUICKEN®

2012 - 2010, for Windows®

Refer to this guide for instructions on how to use Quicken's online account services to save time and automatically keep your records up to date. This guide will be broken up into product versions, please be sure to follow the steps that apply to the version of Quicken you are currently utilizing.

Before you can download your transactions with Quicken you will need internet access, your customer ID and password. *

*Your Quicken customer ID and password are the same as the ones that you use to log in to HomeLink.

This Getting Started Guide contains the following information:

- **Downloading the Latest Quicken Updates-** How to download free product updates as they become available for your version of Quicken.
- **Creating a New Quicken Account-** How to use the Express Setup to create a new Quicken account for downloading transactions and paying bills online.
- **Keeping Your Quicken Accounts Up to Date-** How to download transactions or send payments with accounts that you have activated for online account services.
- **Using Online Bill Payment-** How to set up an online payee and create an online payment.

Click the version you are looking for

2011- [CREATING A NEW QUICKEN ACCOUNT 2011](#)

2010 - [CREATING A NEW QUICKEN ACCOUNT 2010](#)

2009 - [CREATING A NEW QUICKEN ACCOUNT 2009](#)

For step-by-step instructions with an online task (or any other Quicken question) go to Help → Quicken Help → select the Search Quick Help tab and type in the topic and click Ask.

DOWNLOADING THE LATEST QUICKEN® UPDATE (Applies to all product versions)



1. Click the Update icon on the Quicken toolbar.
2. Uncheck all boxes → Update Now in the One Step Update Settings dialog.
3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.
4. When the update is completed, close Quicken. Reopen Quicken.

DOWNLOAD OPTION (Applies to all product versions)



Express Web Connect vs. Web Connect: Quicken offers several methods for you to connect to your financial institution.

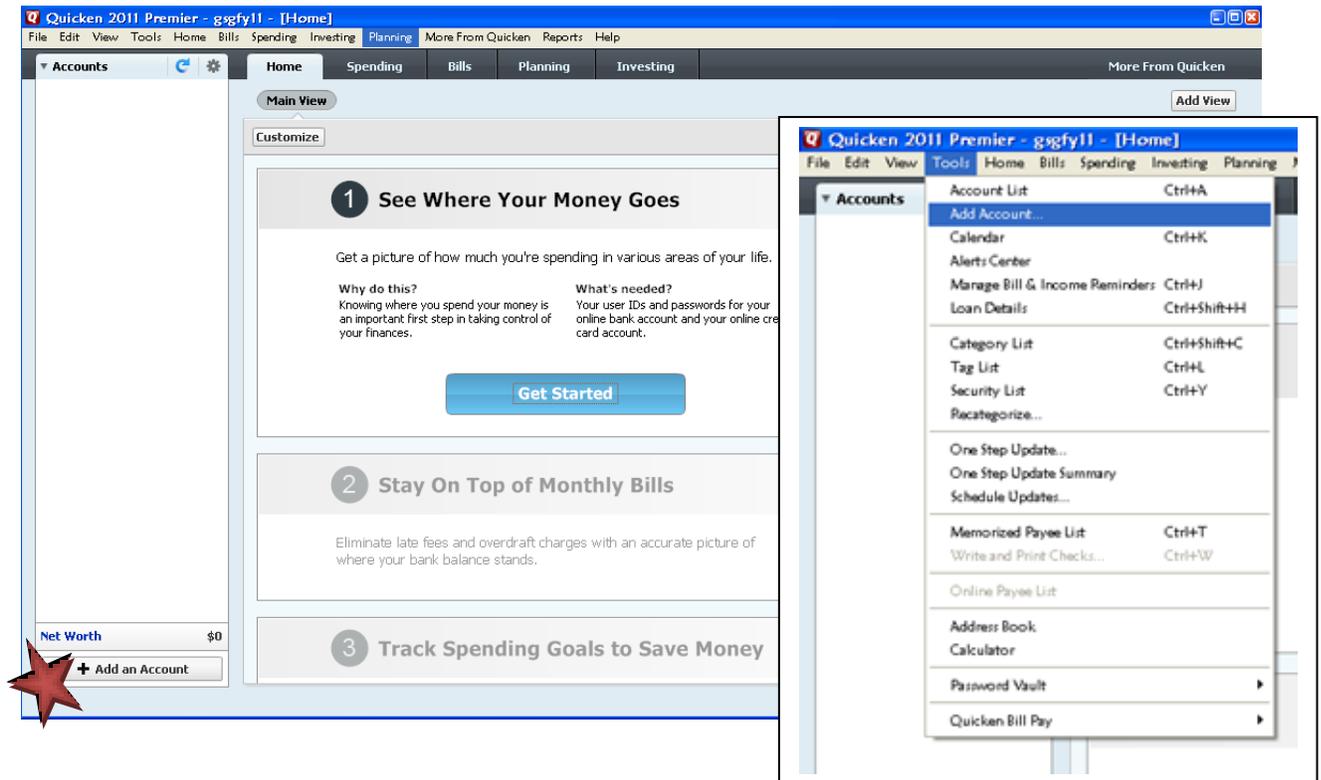
- **Express Web Connect** allows you to download transactions automatically from your bank, but does not enable transfers or bill payments. Your login is the same as what you use to login on your bank website.



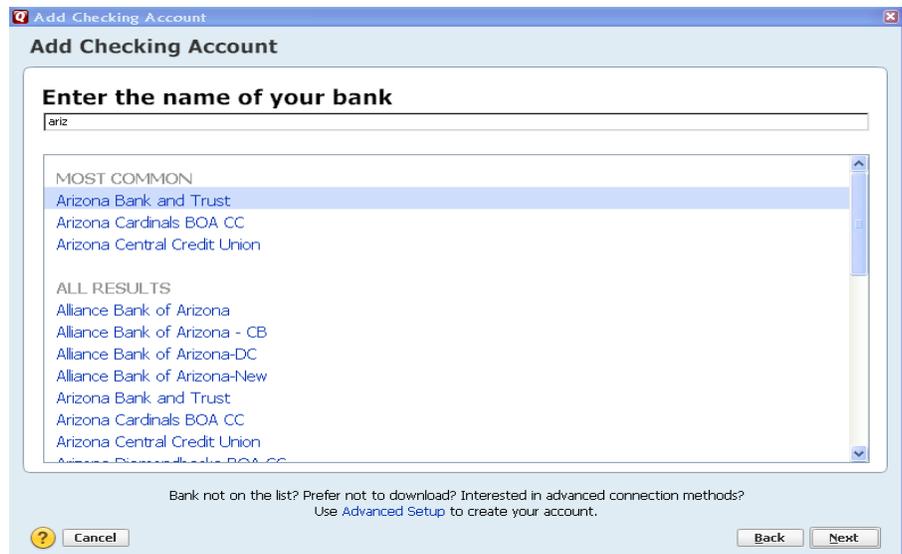
Quicken automatically tries to pick the best method to connect to your financial institution. When you enter a login on this screen, Quicken will try Direct Connect, and if that doesn't work, will default to Express Web Connect. If that doesn't work, you will be taken to the login page of your financial institution's website.

CREATING A NEW QUICKEN ACCOUNT 2011

1. To add a new account Launch Quicken 2010 → Click on the Tools drop down menu → then select the Add Account option or Click the Add an Account button



2. On the Add Account window select the type of account you will be setting up → Click Next. Enter the name of your financial institution → then click the Next button.



3. Enter your customer ID and password (this is usually the same information that you use to login to your financial institution's web site, however it may differ) → Click Next to continue.

Add Checking Account

Arizona State CU
WEB: www.azstcu.org | TEL: 1-800-671-1098

User ID
For your online Arizona State CU account

Password
For your online Arizona State CU account

Save this password

Your credentials are safe with Quicken
We use bank-level encryption to secure your login credentials, they cannot be compromised
We use a read-only connection to your bank. We cannot move or transfer money
[Learn more about our security](#)

Cancel

If you are unsure about which ID and password to use, you may want to contact your financial institution.

4. All downloadable Quicken accounts display. You can choose to add another account right now or start using Quicken and add more accounts later.

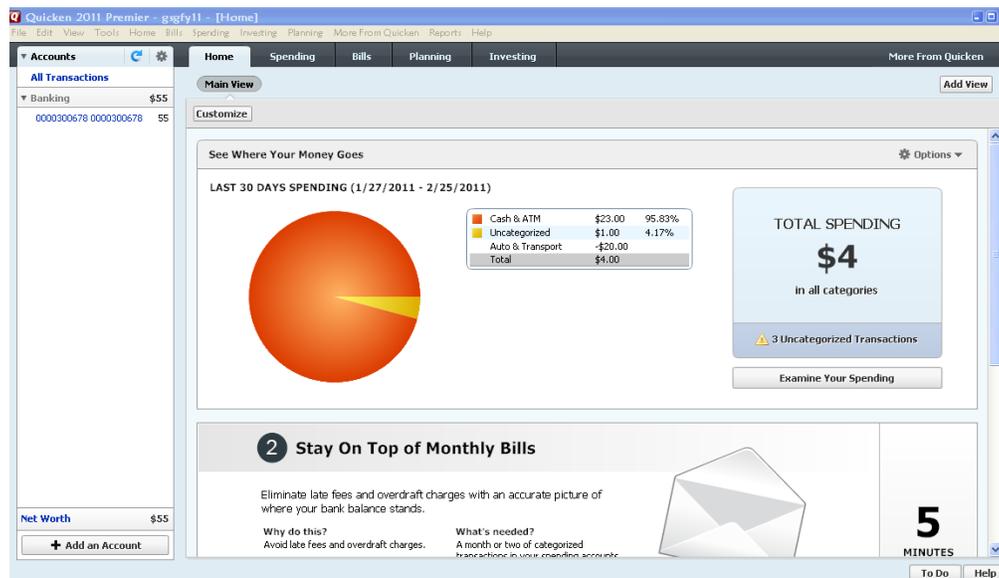
Account Added

FirstMerit Bank N.A.
WEB: www.firstmerit.com | TEL: 1-888-554-4362

✔ 0000300678 0000300678
Downloaded and categorized 81 days of transactions.

Add another account Finish

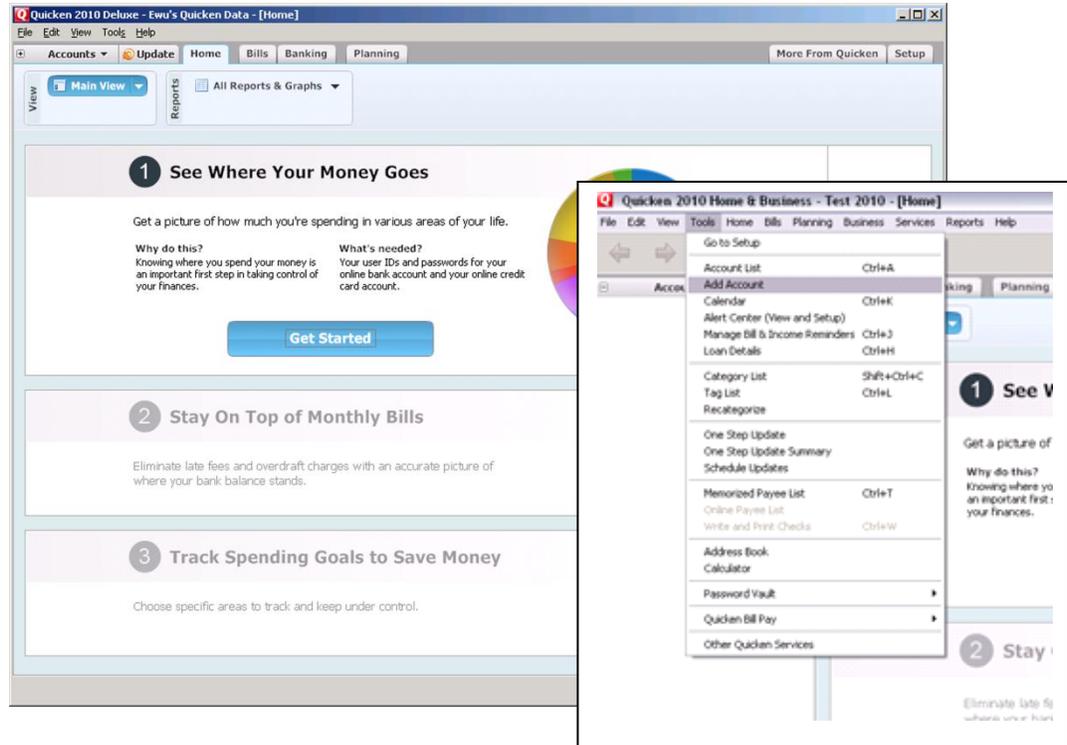
5. Quicken will download your transactions and automatically categorize them, so you can quickly see where your money is going.



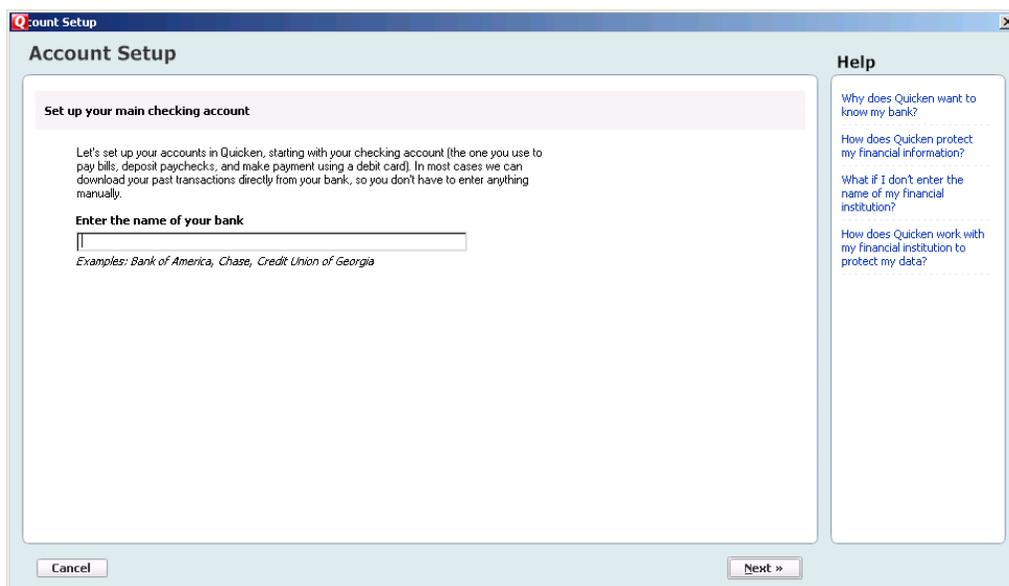
The pie chart on the homepage shows you where your money is going. To review your transactions, click on the account name in blue on the left side of the screen. To add another account, select the “Add Account” button on the bottom left of the screen. To update your accounts, just select the “Update” button at the top left of the screen to download transactions from your bank again.

CREATING A NEW QUICKEN ACCOUNT 2010

- To add a new account Launch Quicken 2010 → Click on the Tools drop down menu → then select the Add Account option.



- On the Account Setup screen enter the name of your financial institution → then click the Next button.



8. Enter your customer ID and password (this is usually the same information that you use to login to your financial institution's web site, however it may differ) → Click Next to continue.

Account Setup

Connect to

Log in to
Enter the same information you use to sign in to the web site for

User ID / User Name
password
Reenter password

Protecting your financial information is critical to us. We use the highest levels of security to protect this information. [Learn more.](#)

I don't want to download transactions from
If you choose this option, you'll be able to finish setting up your account in Quicken, but you'll have to enter all transactions manually.

Help

What login information should I use?
What is Direct Connect?
How can I find my routing or account number?
How does Quicken work with my financial institution to protect my data?
Did you get special Direct Connect instructions from your bank?

Cancel « Back Next »

If you are unsure about which ID and password to use, you may want to contact your financial institution.

9. All downloadable Quicken accounts display. You can customize the Account Name (to use in Quicken: Enter account nickname) for each account by typing directly in the field.

Account Setup

Add Your Accounts

We found the following accounts for you at
The checked accounts will be added to Quicken.
We also recommend entering an account nickname, which will be displayed in Quicken.

Select	Account	Type	Account nickname
<input checked="" type="checkbox"/>	CHECKING XXXX-XXXX	Checking	CHECKING XXXX-XXXX

Help

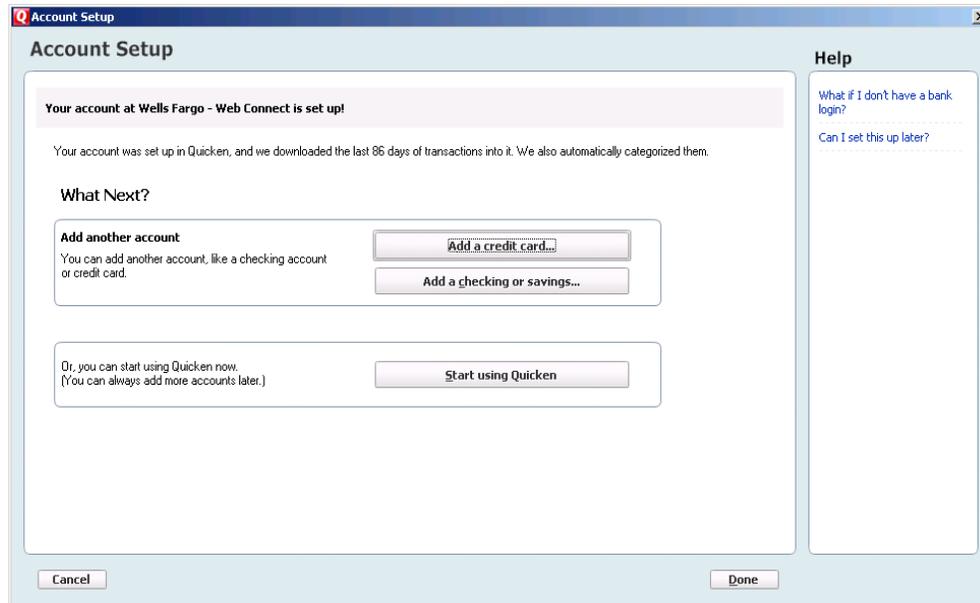
I don't see the account I want to add

Cancel Next >

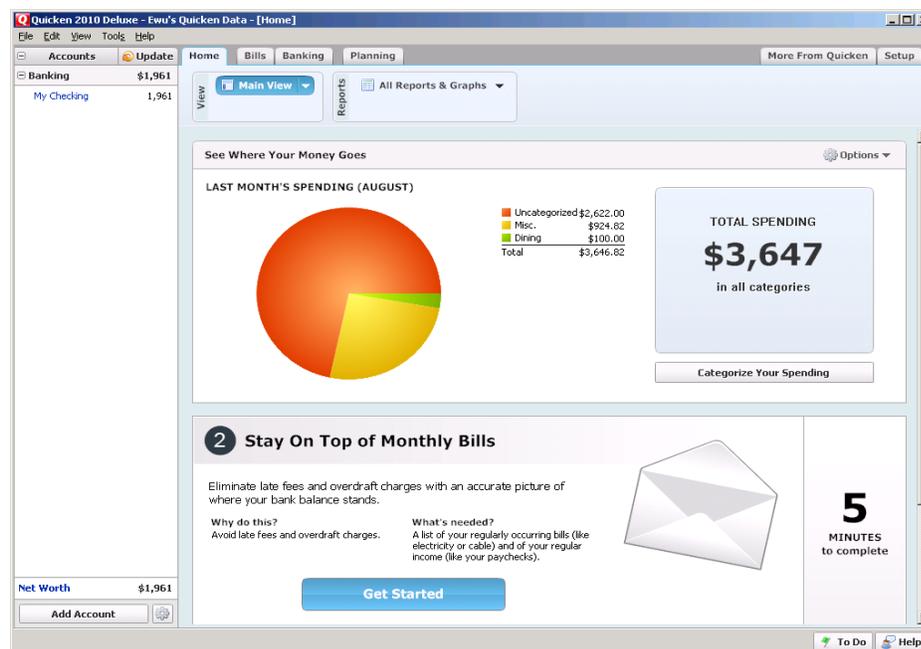
To customize the Account Name in Quicken, enter account nickname

10. Confirm the accounts you wish to set up and/or customize Account Name → click Next

11. Quicken will download your transactions and automatically categorize them, so you can quickly see where your money is going. You can choose to add another account right now or start using Quicken and add more accounts later.



12. The pie chart on the homepage shows you where your money is going. To review your transactions, click on the account name in blue on the left side of the screen. To add another account, select the "Add Account" button on the bottom left of the screen. To update your accounts, just select the "Update" button at the top left of the screen to download transactions from your bank again.



CREATING A NEW QUICKEN ACCOUNT 2009

1. Go to Online drop down Menu → Online Account Services Setup → Create New Quicken Account.
2. **Quicken Windows 2009 version only:** Select the account type you are creating → Click Next

When creating a Credit Card account choose Credit Card and Investing/Retirement for brokerage type accounts. For Money market accounts select either Checking or Savings.

3. If the account is held at the following institution [**Financial Institution Name Goes Here**], select from the list provided.
4. After you have selected yes to connect to [**Financial Institution Name Goes Here**] through Quicken, click Next.
5. Enter your customer ID and password (your password will need to be entered in a second time for confirmation) Click Next to continue.

Account Setup

Enter your Password for _Server Jay FIAT Test

Financial Institution _Server Jay FIAT Test
User ID DEMOBK

_Server Jay FIAT Test password
Reenter password

Your password and data are secure. Find out how Quicken protects you.

_Server Jay FIAT Test requires that you enter the account number in order for Quicken to find your account
Account Number

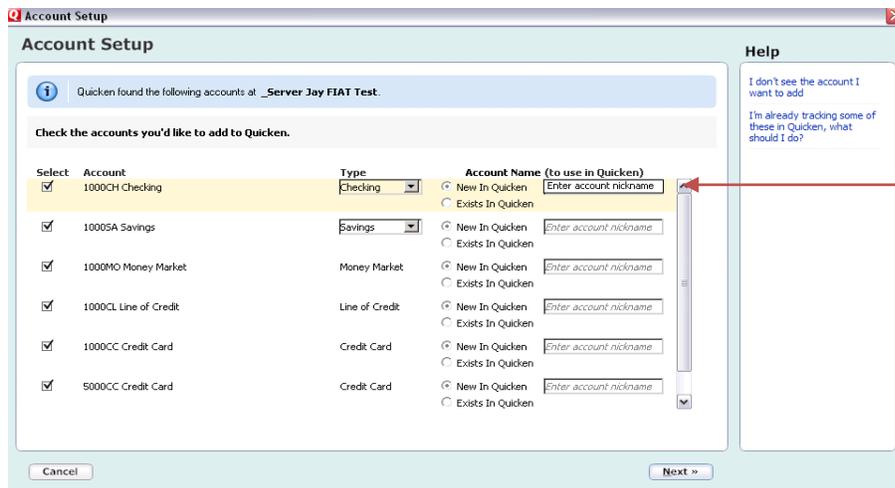
Cancel Back Next

Help

Which password should I enter?
Why can't I change my User ID?
Is my password secure?
How does Quicken work with my financial institution to protect my data?

If you are unsure about which ID and password to use, then see the **Need a Customer ID and password** information to the right.

6. All downloadable Quicken accounts display. You can customize the Account Name (to use in Quicken: Enter account nickname) for each account by typing directly in the field.



To customize the Account Name in Quicken, enter account nickname

7. Confirm the accounts you wish to set up and/or customize Account Name → click Next

- After the Quicken One Step update is completed, you will be prompted to store your password in the Password Vault. Select YES or NO to continue, → Click Next

Account Setup

Keep your financial institution password in Quicken's secure Password Vault
This allows you to access all of your connected accounts with one password.

Would you like to store your password in the Password Vault?

Financial Institution **_Server Jay FIAT Test**
User ID **DEMOBK**
Password *********

Yes
Select an easy to remember password to use for your password vault.
You'll use your Password Vault password to access all of your stored financial institution passwords.

Password for the Password Vault: Password must be at least 6 characters
Re-enter Password:

Your password and data are secure. Find out how Quicken protects you.

No (I'll enter my financial institution password each time I download transactions.)

Cancel Next >>

Help

What is the Password Vault?
Is my password safe?
What password should I enter?

To learn on the Password Vault, click on **What is the Password Vault** under the Help menu

To keep your password in Quicken's secure Password Vault select yes.

Account Setup

Setup Complete

Summary of accounts added

Account	Type	Connection Type	Transactions Downloaded	Online Bill Pay
Jay's Checking 1	Checking	Direct Connect	9	Yes (Bank Billpay)
Jay's Savings 2	Savings	Direct Connect	2	Yes (Bank Billpay)
1000MO Money Market	Money Market	Direct Connect	2	Yes (Bank Billpay)
1000CL Line of Credit	Line of Credit	Direct Connect	0	-
1000CC Credit Card	Credit Card	Direct Connect	2	-
5000CC Credit Card	Credit Card	Direct Connect	0	-

Next Steps

View the **flagged accounts** to review and accept your downloaded transactions.
(You will do this each time you download new account activity)

Check the **To Do** tab in Quicken for other suggestions on how to make the most of Quicken.

Done

Help

What does Connection Type mean?
What does Transactions Downloaded mean?
What is Online Bill Pay?
How do I view my register?
What is the To Do tab?
Where should I go from here?

Cancel

Summary of accounts added

- After reviewing your Account Setup Summary page, Click Done

YOU ARE SET UP AND READY TO USE QUICKEN