Getting Started with Quicken® Essentials for Mac®

Before you can download your transactions with Quicken Essentials, you must have Internet access, your Customer ID, and PIN.

Your Quicken Customer ID and PIN are the same as you use to log in to HomeLink

For step-by-step help with an online task, choose the **Help** menu **Quicken Essentials Help/Basics/**

This guide includes the following sections:

- Downloading the Latest Quicken Update
- Creating a New Account and Downloading via Direct Connect
- Creating a New Account and Downloading via Web Connect
- Keeping your Quicken Accounts up to Date
- For Additional Help

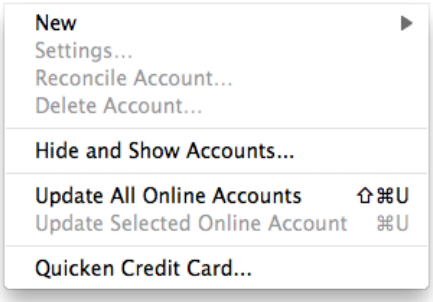
DOWNLOADING THE LATEST QUICKEN UPDATE

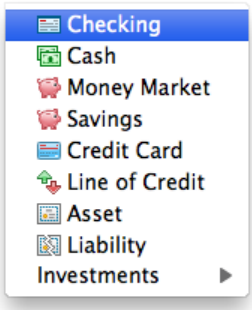
1. From the **Quicken** menu choose **Check for Updates**.
2. Follow the on-screen instructions.

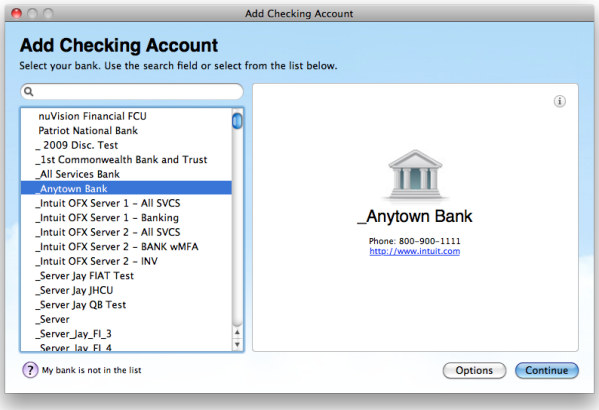
CREATING A NEW ACCOUNT AND DOWNLOADING VIA DIRECT CONNECT

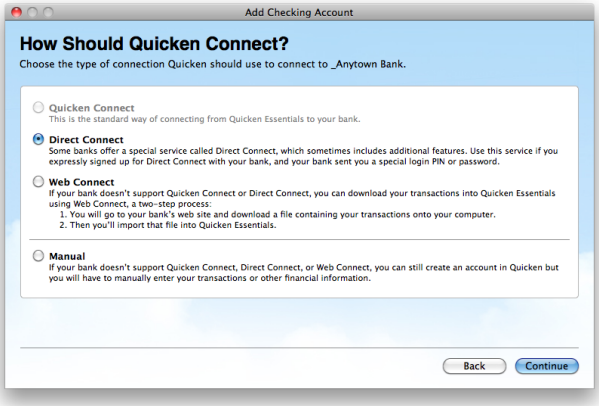
Please see related screen shots below the steps:

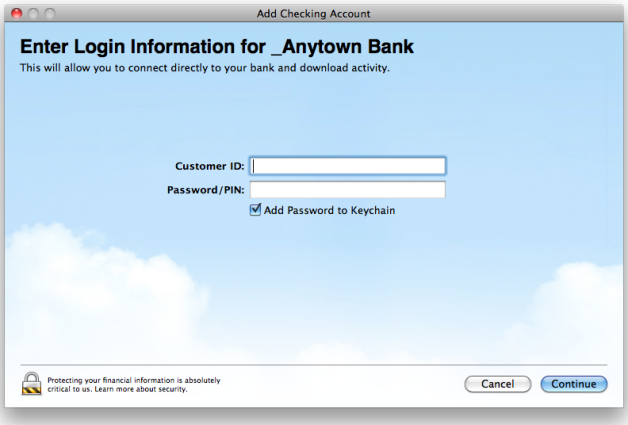
1. From the **Quicken** menu choose **Account**/**New** (from the submenu choose the account type such as Checking, Savings, or other)
2. In the *Add Account* window that appears, start typing First Commonwealth Federal Credit Union.
3. Select the First Commonwealth Federal Credit Union in the list, and click **Options**
4. Select the *Direct Connect* Radio Button and Click **Continue**.
5. Log into your Intuit Account first; enter your **Member ID** and **Password**, and click **Continue**. Then enter your **Customer ID** and **Password** for online access to HomeLink**.**
6. Uncheck any account that you do not want to set up.
7. Click **Continue** when you have specified how Quicken should handle each online account.
8. Click **OK** to view the account registers.

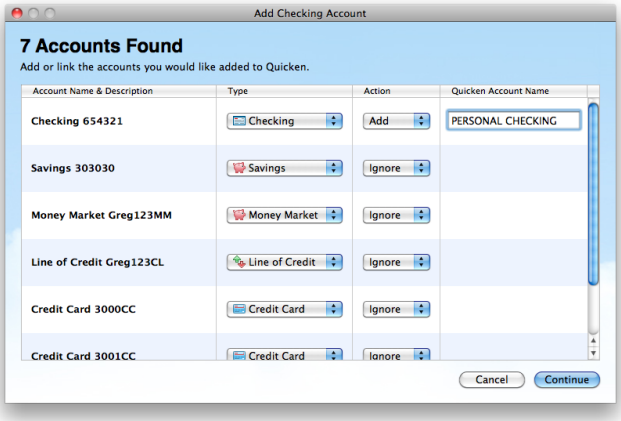





Add Checking Account
Add Checking Account
Select your bank. Use the search field or select from the list below.
nuVision Financial FCU
Patriot National Bank
_ 2009 Disc. Test
_1st Commonwealth Bank and Trust
_All Services Bank
_Anytown Bank
_Intuit OFX Server 1 – All SVCS
_Intuit OFX Server 1 – Banking
_Intuit OFX Server 2 – All SVCS
_Intuit OFX Server 2 – BANK wMFA
_Intuit OFX Server 2 – INV
_Server Jay FIAT Test
_Server Jay JHCU
_Server Jay QB Test
_Server
_Server_Jay_FI_3
_Anytown Bank
Phone: 800-900-1111
http://www.intuit.com
My bank is not in the list
Options
Continue


Add Checking Account
How Should Quicken Connect?
Choose the type of connection Quicken should use to connect to _Anytown Bank.
Quicken Connect
This is the standard way of connecting from Quicken Essentials to your bank.
Direct Connect
Some banks offer a special service called Direct Connect, which sometimes includes additional features. Use this service if you expressly signed up for Direct Connect with your bank, and your bank sent you a special login PIN or password.
Web Connect
If your bank doesn't support Quicken Connect or Direct Connect, you can download your transactions into Quicken Essentials using Web Connect, a two-step process:
1. You will go to your bank's web site and download a file containing your transactions onto your computer.
2. Then you'll import that file into Quicken Essentials.
Manual
If your bank doesn't support Quicken Connect, Direct Connect, or Web Connect, you can still create an account in Quicken but you will have to manually enter your transactions or other financial information.
Back
Continue


Add Checking Account
Enter Login Information for _Anytown Bank
This will allow you to connect directly to your bank and download activity.
Customer ID:
Password/PIN:
Add Password to Keychain
Protecting your financial information is absolutely critical to us. Learn more about security.
Cancel
Continue


Add Checking Account
7 Accounts Found
Add or link the accounts you would like added to Quicken.
Account Name & Description
Type
Action
Quicken Account Name
Checking 654321
Checking
Add
PERSONAL CHECKING
Savings 303030
Savings
Ignore
Money Market Greg123MM
Money Market
Ignore
Line of Credit Greg123CL
Line of Credit
Ignore
Credit Card 3000CC
Credit Card
Ignore
Credit Card 3001CC
Credit Card
Ignore
Cancel
Continue

CREATING A NEW ACCOUNT AND DOWNLOADING VIA WEB CONNECT

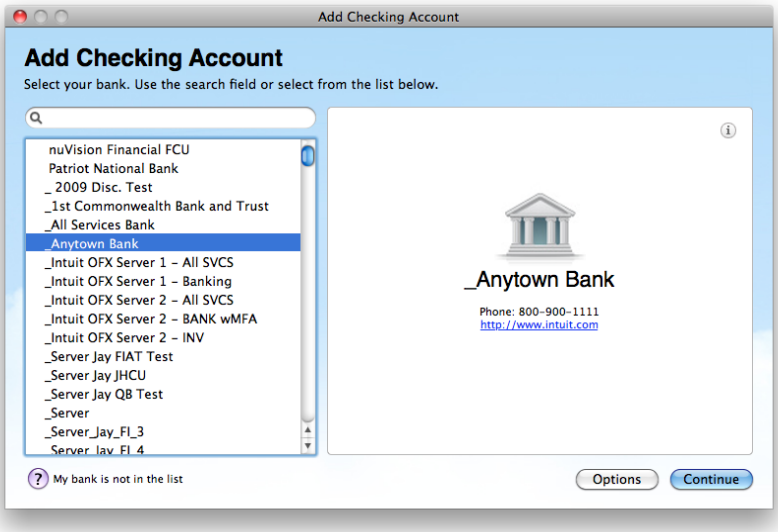
Please see related screen shots below the steps:

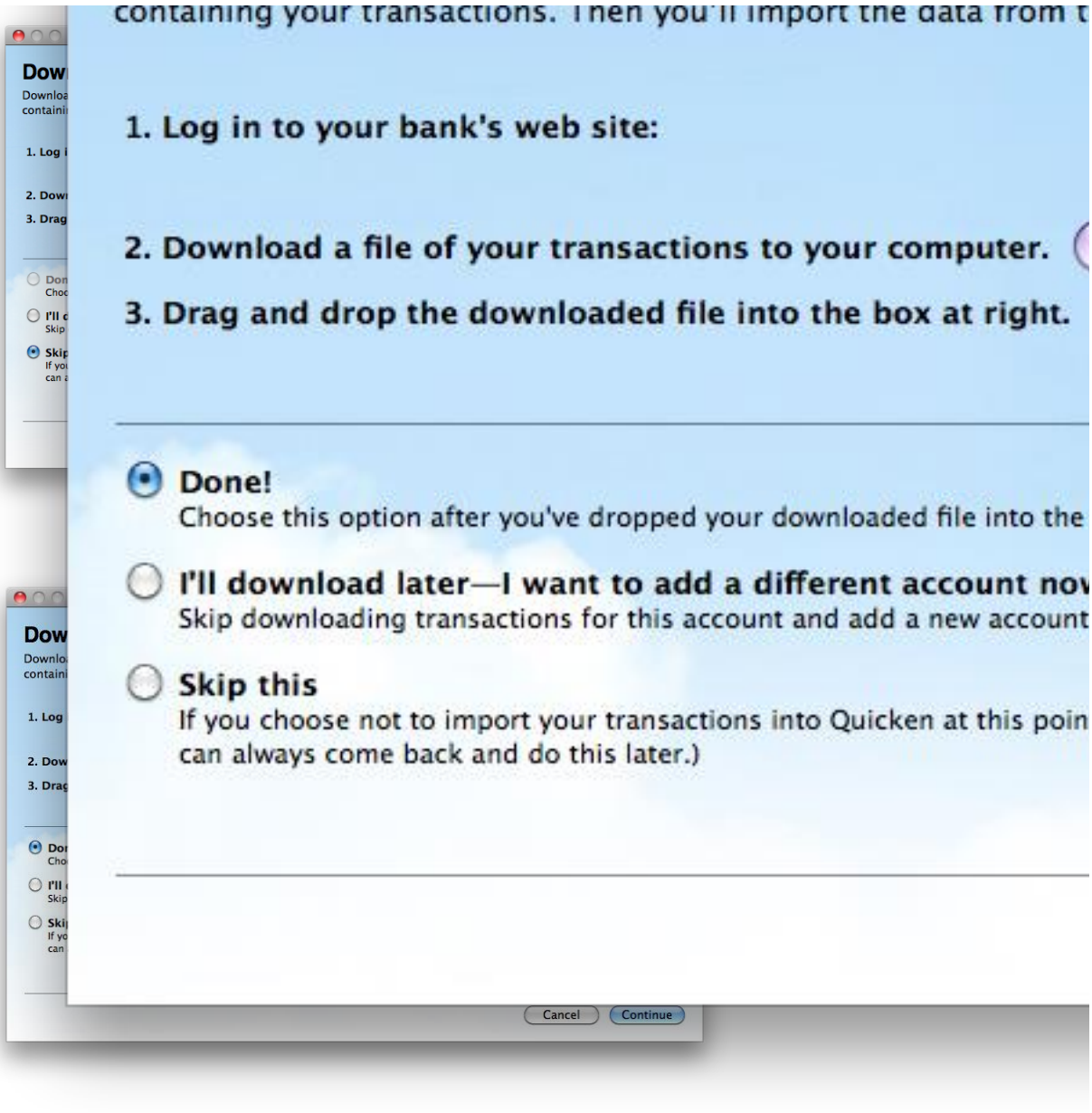
Before you can download your transactions with Quicken Essentials, you must have Internet access, your Customer ID, and PIN.

Next step: login to HomeLink and follow the steps to download transactions into Quicken.

Save the downloaded Web Connect file (With extension .QFX)

1. Choose the **Quicken** menu **/Account/New** (from the submenu choose the account type such as Checking, Savings, or other)
2. In the *Add Account* window that appears, start typing First Commonwealth Federal Credit Union. Select First Commonwealth Federal Credit Union in the list, and click **Continue.**
3. Drag and Drop the downloaded Web Connect .QFX file to the designated area in the *Download Transactions* Quicken window.
4. Click Continue




containing your transactions. Then you'll import the data from t
1. Log in to your bank's web site:
2. Download a file of your transactions to your computer.
3. Drag and drop the downloaded file into the box at right.
Done!
Choose this option after you've dropped your downloaded file into the
I'll download later—I want to add a different account nov
Skip downloading transactions for this account and add a new account
Skip this
If you choose not to import your transactions into Quicken at this poin
can always come back and do this later.)
Cancel
Continue

KEEPING YOUR QUICKEN ACCOUNTS UP TO DATE

To download Transactions into your Account Register:

1. Choose **Accounts/Update Selected Online Account**.
2. Enter Password in the Pop-up dialog box.
3. Click **OK**

Quicken connects to the Internet and downloads your transactions for all the online accounts at First Commonwealth Federal Credit Union that you have set up in Quicken.

CONGRATULATIONS! YOU ARE SET UP AND READY TO USE QUICKEN ESSENTIALS