

GETTING STARTED WITH QUICKEN®

2010 - 201, for Windows®



This guide is 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 LogIn ID and Password. * Your Quicken ID and PIN are the same as your BankFIRST Online Banking User ID and Password.

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.

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, or click on the *Tools* drop down menu and select → *One Step Update*.
2. Uncheck all boxes and click → *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. Then reopen Quicken.

DOWNLOAD OPTION (Applies to all product versions)



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

- **Direct Connect** provides a direct connection to your financial institution, and allows you to download transactions, as well as initiate transfers and bill payments directly from Quicken, without having to log into your bank website. Not all financial institutions support Direct Connect. Some financial institutions may charge an additional fee for this service. If you are interested in Direct Connect, please contact your financial institution to activate it before you set up your account in Quicken. Once you receive your Direct Connect login information, enter it in this screen.
- **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 log 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 ACCOUNT (Click on the product version you are looking for)

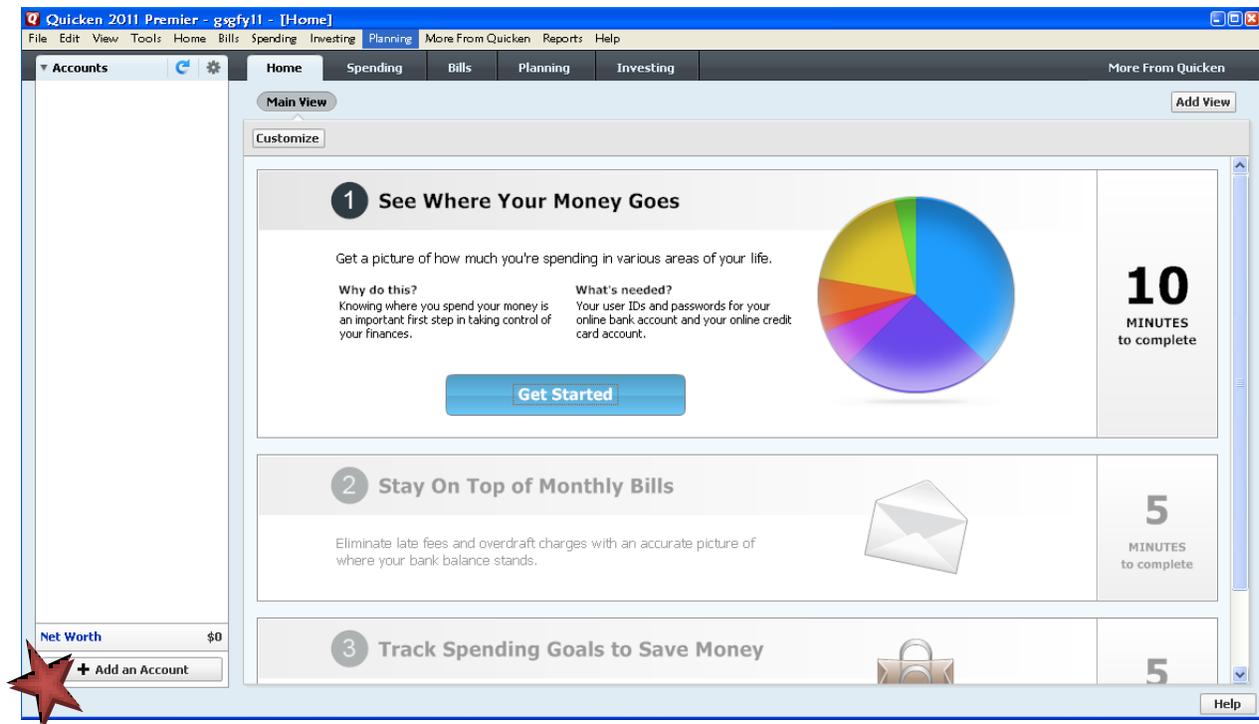
2012- [CREATING A NEW QUICKEN ACCOUNT 2012](#)

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

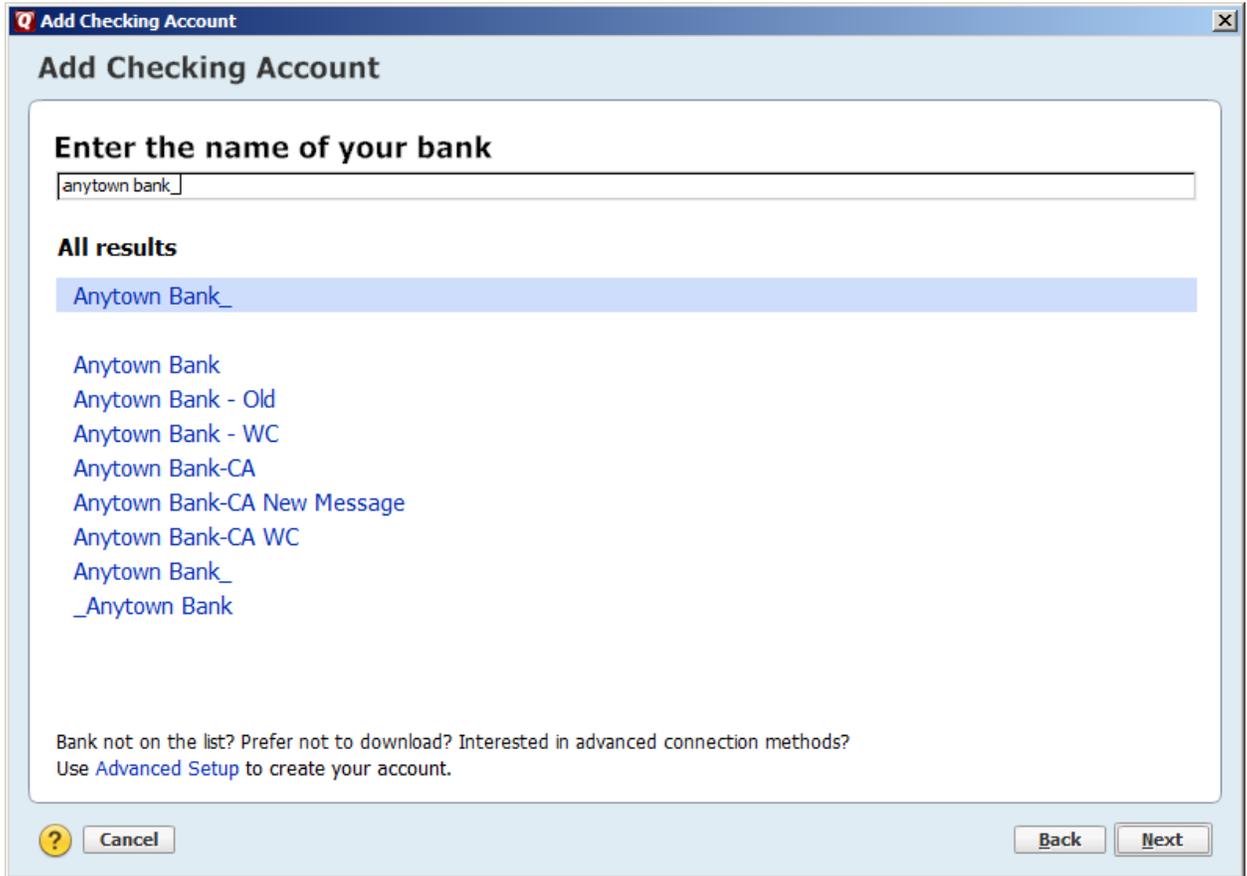
2010 - [CREATING A NEW QUICKEN ACCOUNT 2010](#)

[CREATING A NEW QUICKEN ACCOUNT 2012](#)

1. To add a new account, launch Quicken 2012, click the *Tools* drop down menu and select → *Add Account* or click the *Add an Account* button



2. On the Add Account window select the type of account you will be setting up. In the window that opens, select → BankFIRST and 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 *Connect* to continue.

Add Checking Account

Add Checking Account

Anytown Bank
WEB: www.anytown.com TEL: 800-200-0000

Anytown Bank User ID / User name
for your Anytown Bank account
[text input]

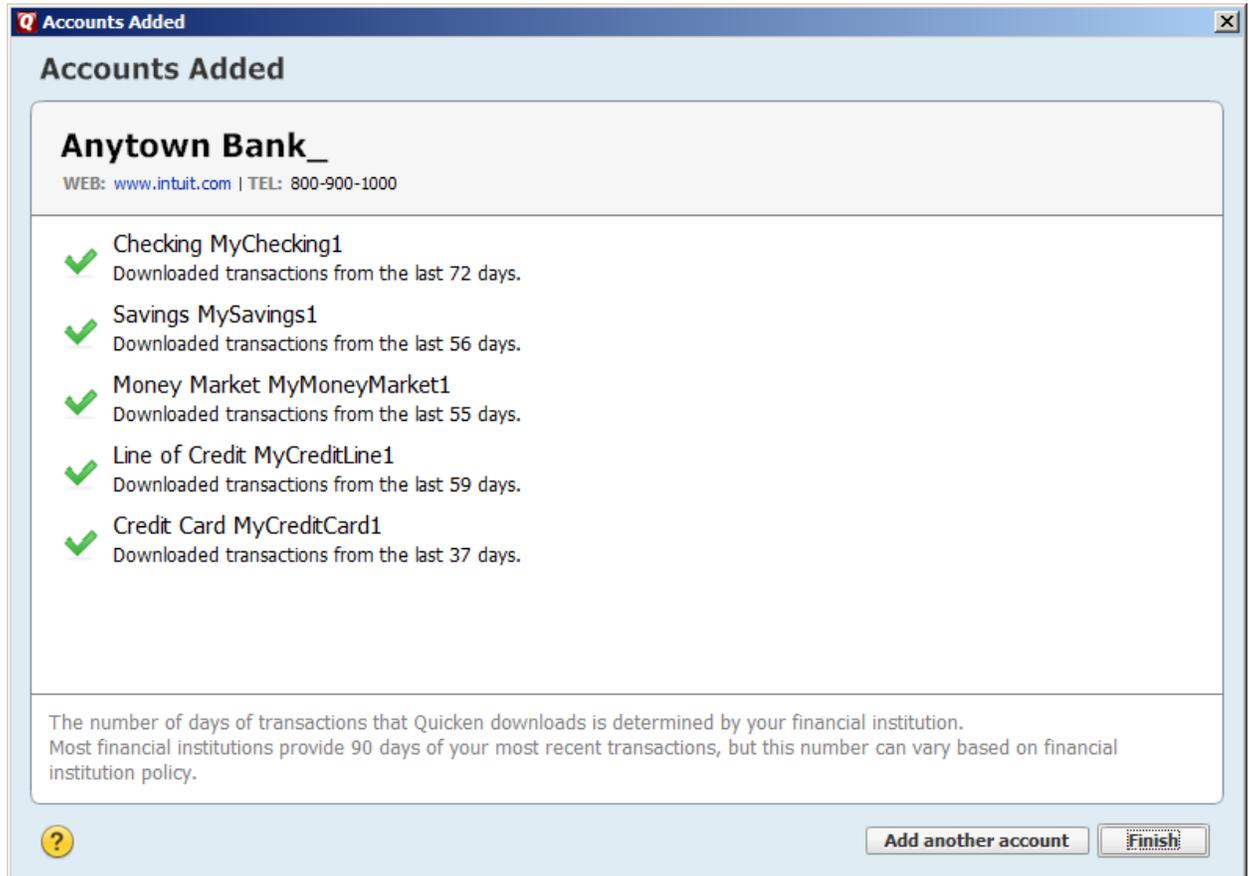
Anytown Bank password
for your Anytown Bank account
[password input]

Remember this password

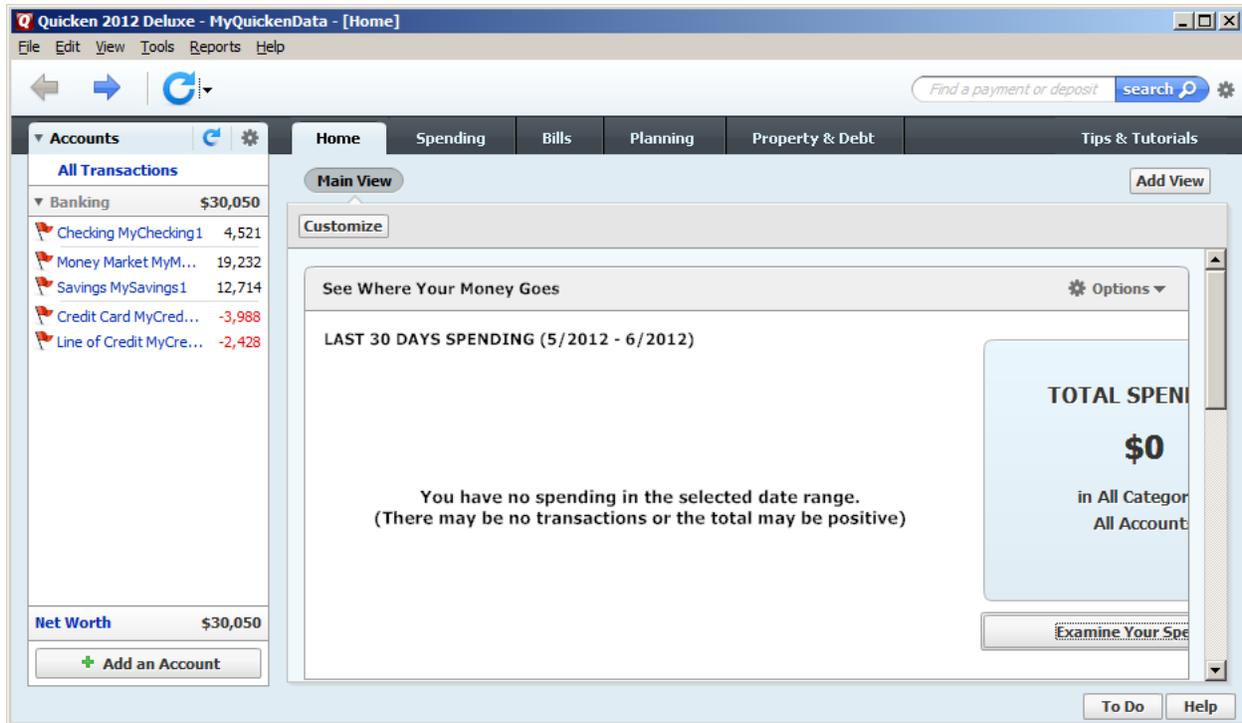
Your credentials are safe with Quickconnect
We use bank-level encryption to secure your login credentials, they cannot be compromised.
[Learn more about our security](#)

Cancel | Back | **Connect**

4. All downloadable Quicken accounts display and are enabled. You can *Add another account* with a different User ID, or click *Finish*.



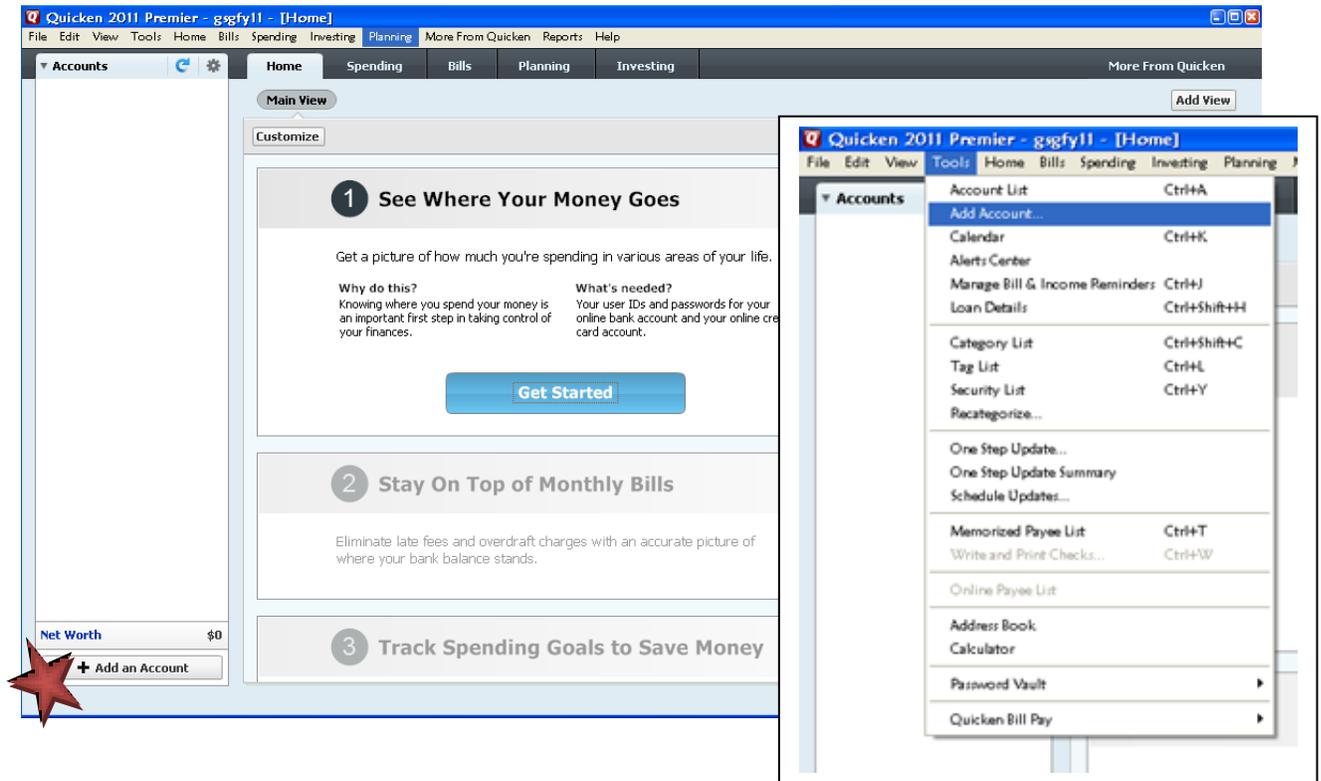
5. To review your transactions, click on the account name in blue on the left side of the screen. For each transaction enter *Accept*, or *Accept All* if all transactions are acceptable. Quicken will categorize your transactions so you can quickly see where your money is going.



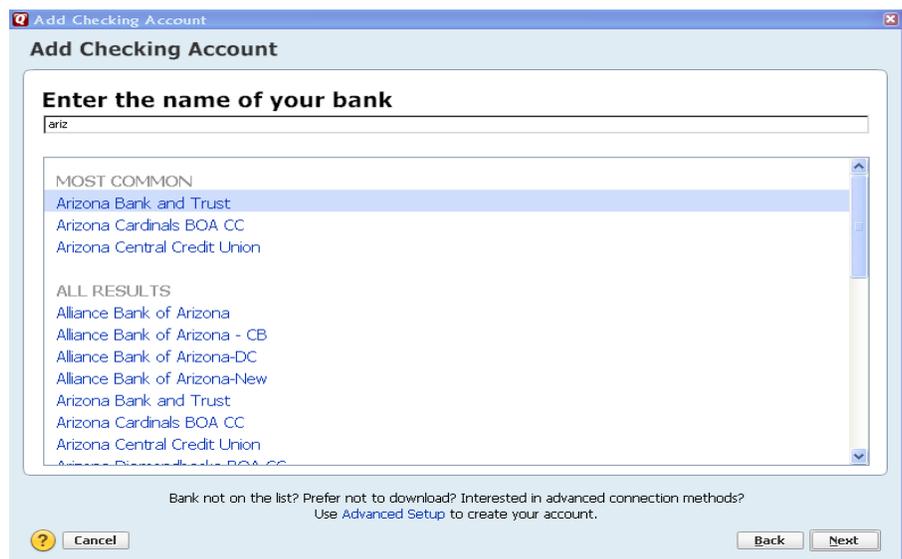
6. Quicken will download your transactions and automatically categorize them. The pie chart on the homepage shows you where your money is going. To update your accounts, just select the "Update" button (blue circular arrow) at the top left of the screen.

CREATING A NEW QUICKEN ACCOUNT 2011

1. To add a new account Launch Quicken 2011, select the *Tools* drop down menu and select → *Add Account*, 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 BankFIRST → then click the Next button.



3. Enter your customer ID and password (this is usually the User ID and Password you use to login to your financial institution's Online Banking, 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.

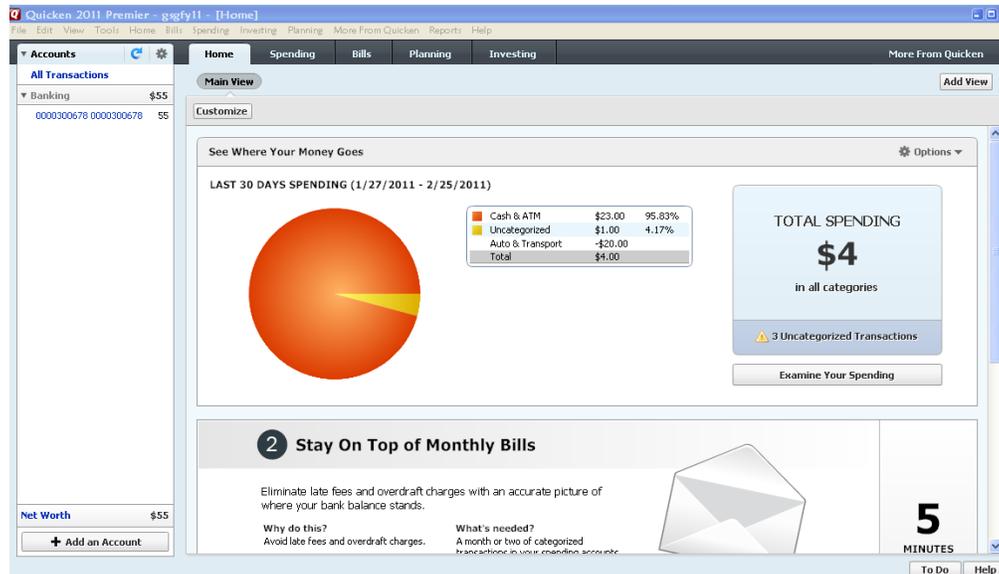
Account Added

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

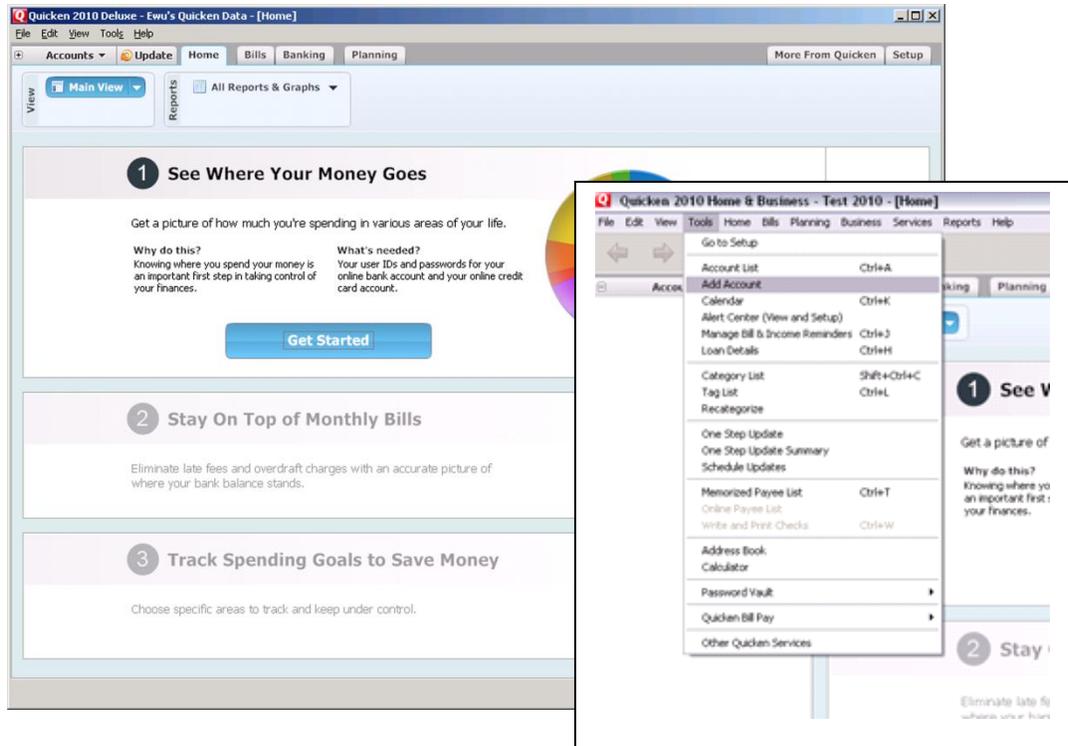
5. Quicken will download your transactions and automatically categorize them, so you can quickly see where your money is going.



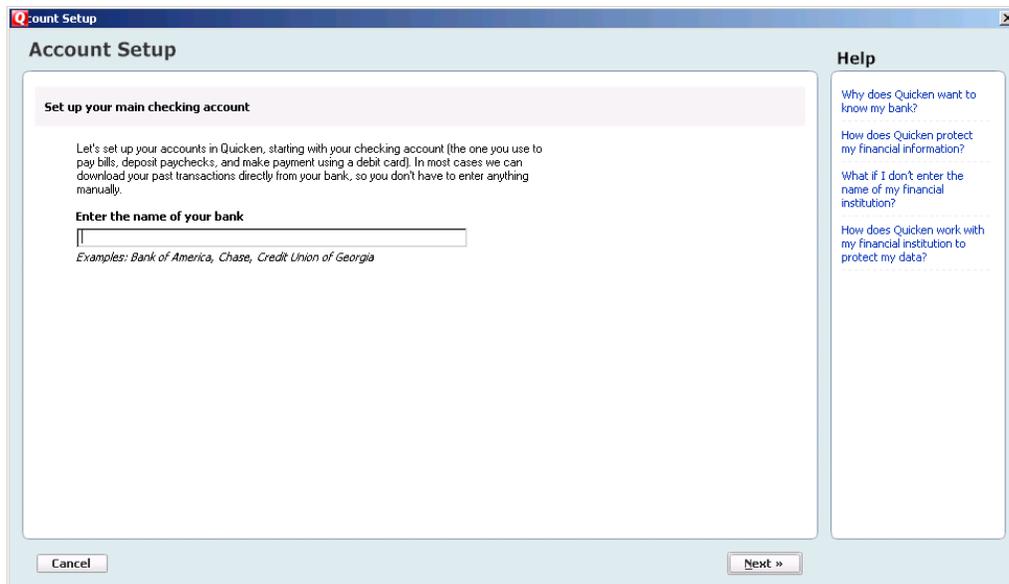
7. The pie chart on the homepage shows you where your money is going. To review your transactions, click on the account name in blue on the left side of the screen. To add another account, select the *Add an Account* button on the bottom left of the screen. Quicken will download your transactions and automatically categorize them. The pie chart on the homepage shows you where your money is going. To update your accounts, just select the “Update” button (blue circular arrow) at the top left of the screen.

CREATING A NEW QUICKEN ACCOUNT 2010

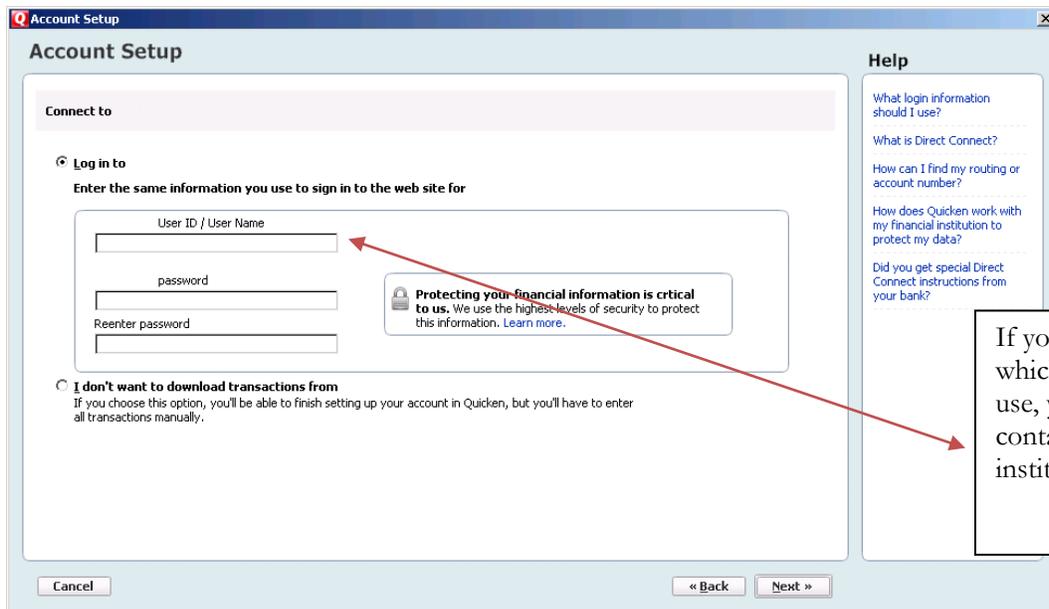
1. To add a new account Launch Quicken 2010, click on the *Tools* menu and select → *Add Account*



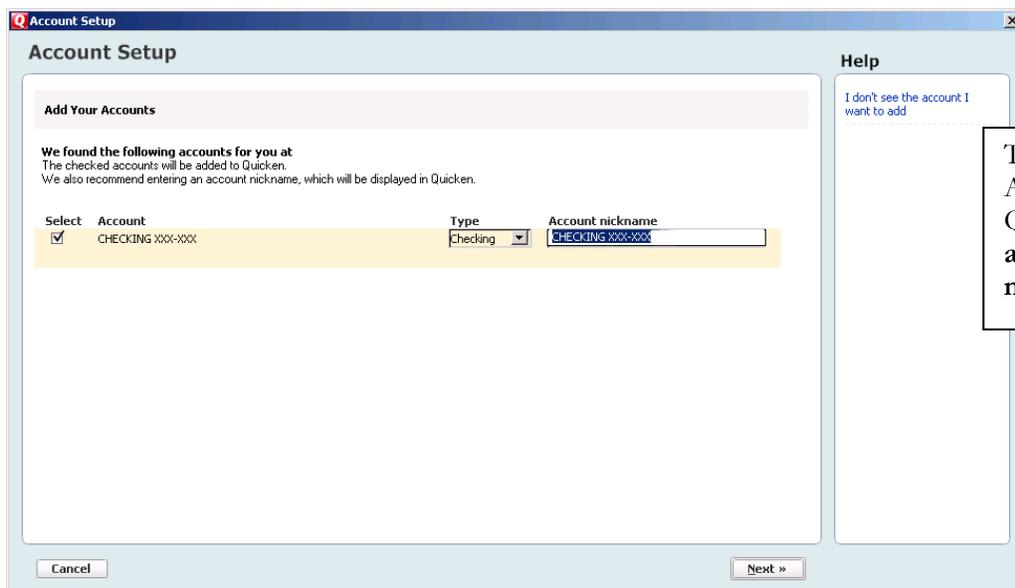
2. On the Account Setup screen enter the name of your financial institution and click → Next.



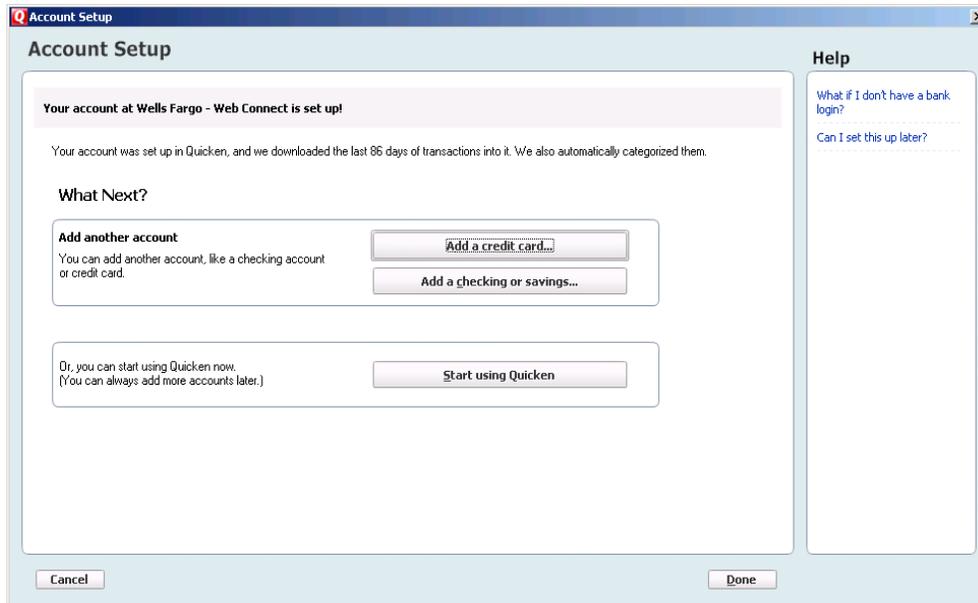
3. Enter your customer ID and password (this is usually the same information that you use to login to your financial institution's web site, however it may differ) → Click Next to continue.



4. All downloadable Quicken accounts display. You can customize the Account Name, enter an *Account nickname* for each account by typing directly in the field.



5. Confirm the accounts you wish to set up and/or customize Account Name → click Next
6. 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.



- 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.

