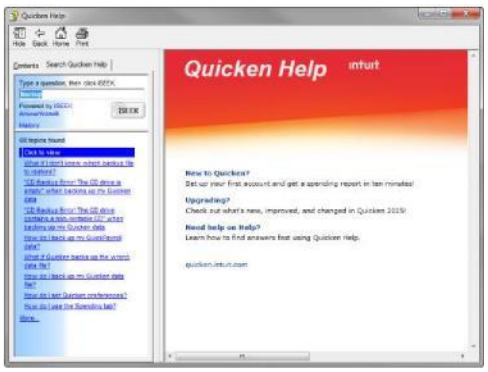
Quicken Getting Started Guide

Connect and Update Your Data

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

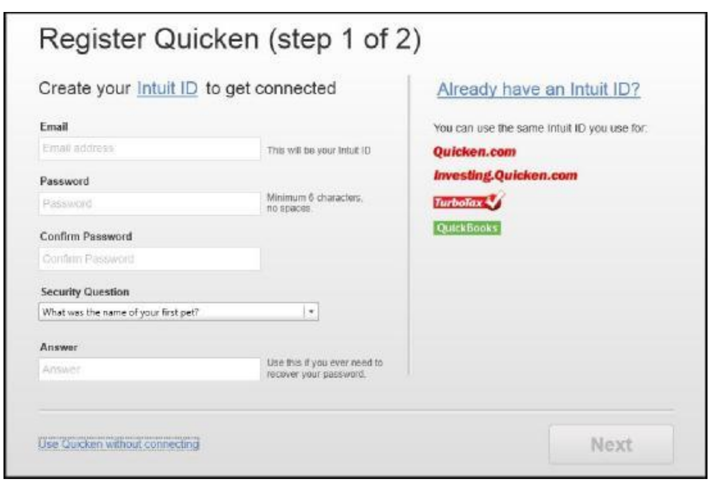
- Customer ID
- Personal Identification Number (PIN) or password
  For Quicken Web Connect/Express Web Connect accounts, use the same customer ID and PIN/password as your financial institution website. For Direct Connect, they may be different. Please contact your financial institution to verify your 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 an Intuit ID

When you set up an account for online banking, Quicken requires you to register your Quicken file with an Intuit ID. If you already use other Intuit products, like TurboTax or QuickBooks, you may already have an Intuit ID.



1. Fill in the information to set up your Intuit ID and complete your registration
2. If you already have an Intuit ID, click the "Already have an Intuit ID" link and sign in to complete your registration

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 2014 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. Click **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 to select 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 2014.

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.