

## Direct Connect Getting Started Guide For Quicken 2002 for Windows



### Information you'll need to get started

To use online banking with Quicken you must have Internet access. Before you can set up your Quicken accounts to use the online account access, you will need to contact your financial institution for the following:

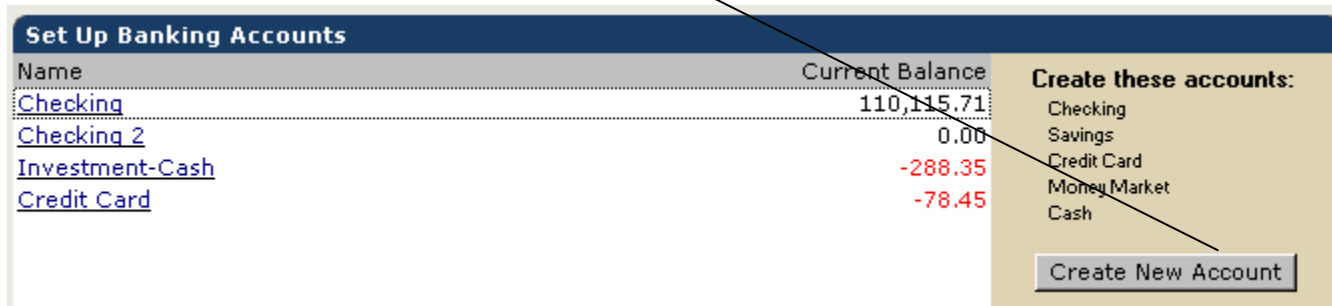
- Allied First Home Banking Login ID
- Personal Identification Number (PIN) or password

When you have received the necessary information, this guide will help you enable your accounts for online account services in Quicken. For step-by-step help for any online task, go to **Getting Started -- Banking in Quicken Help**.

### Create a new Quicken account for online access

Skip this section if the account you want to enable is already in the Quicken Data file you are using.

- 1 From the **My Finances** page, select the **Create New Account** button in the section titled **Set Up Banking Accounts**.



- 2 Follow the on-screen instructions to create a new bank or credit card account.

### Enable a Quicken account for online account services

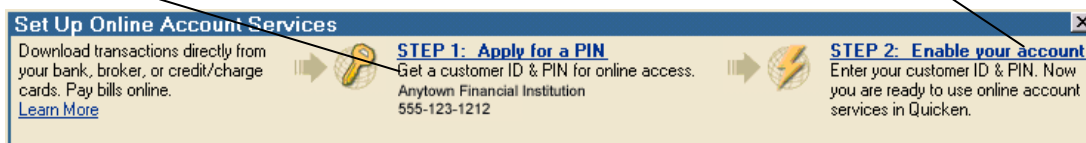
- 1 From the **Finances** menu, select **One Step Update**, uncheck all boxes and click on **update now**.

\*\*If you are running Windows XP you will need to first go out to the following URL and manually update the OFXRoots.crt, <http://www.intuit.com/support/quicken/ofxroot.html> download and follow the instructions.

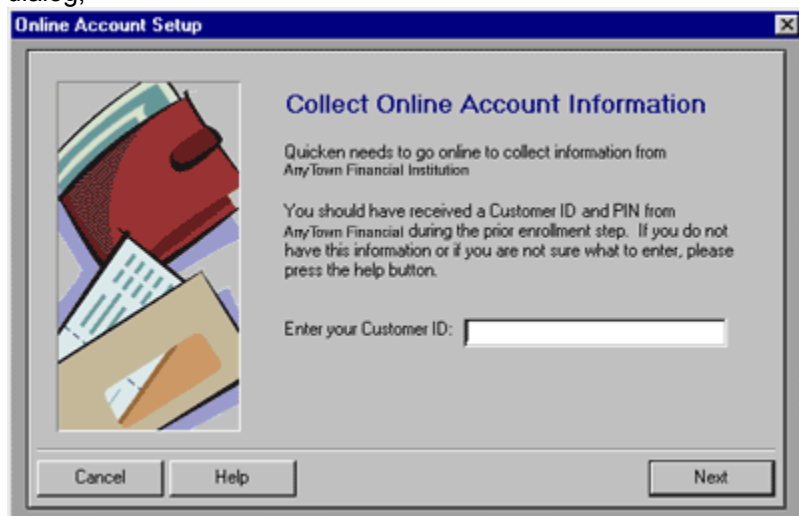
2. From the **Banking** menu, select **Online Banking Setup**.
- 3 Select **Edit Existing Quicken Account**, highlight the account you want to enable and click the **Next** button.

- 4 If you do not have an online services PIN for this account,

click **Step 1: Apply for a PIN**. If you already have a PIN, click **Step 2: Enable your account**.



- 4 Enter your Customer ID that you received from your financial institution in the following **Online Account Setup** dialog,



- 5 Follow the on-screen instructions to enable this account for online account access. You will go through and select each suffix for that account individually that you want Quicken to be able to update.

### Download transactions for the first time

The first time you use online account access, we recommend that you connect just to download transactions. This will enable you to update your register before doing other tasks. You must complete one online session before attempting to send online transactions.

- 1 From the **Banking** menu select **Online Banking**.
- 2 Choose your financial institution from the list box next to the logo on the left side of the window.
- 3 If you have more than one account, select the appropriate account from the account field located below the **Transactions** tab.
- 4 Click **Update/Send**.
- 5 Follow the on-screen instructions.

- Step 1** The first time that you request a history download it will automatically download 60 days worth of history.
- Step 2** Because the first download will provide you with 60 days worth of history you will need to review the transactions prior to accepting them. On the left hand side of the screen you will see a status column which will show **new** or **match**, for those listed as new you will want to accept them manually and they will be entered into the register. Those that are listed as a match are duplicates that Quicken found in your registry.