



Quicken 2015 for Windows Getting Started Guide for Financial Institutions

Financial Institution Support – OFX Connectivity Group

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Quicken 2015 Getting Started Guide

Thank you for choosing Quicken!



About this Guide

This guide helps you get started with Quicken 2015 as quickly as possible. You'll learn:

- What you will need to get started
- How to set up an account for online banking (Direct Connect)
- How to set up an account for online banking (Web Connect & Express Web Connect)
- How to update an account setup for online banking
- How to set up Bill Pay (Direct Connect-only)

New in Quicken 2015

Quicken 2015 maintains the same online banking connectivity features with a few new features not found on previous versions.

Features

Free credit score

- Truly free – no credit card required
- Includes free credit report summary that explains the factors that impact your score
- Plus daily monitoring and alerts to help protect against identity theft.
- Quick sign up – see your free credit score in 2 minutes or less

Portfolio X-Ray (Available with Premier and higher versions)

- Reports not just on funds, but securities held within your funds
- Instantly see multiple views of your portfolio (including asset allocations, geographic regions, sectors, and more)
- Get insights to help you take actions to improve your portfolio

Improved Investment Tools (Available with Premier and higher versions)

- In-product symbol lookup right within Quicken
- Improved bond sell actions
- Automatic download of option prices and history

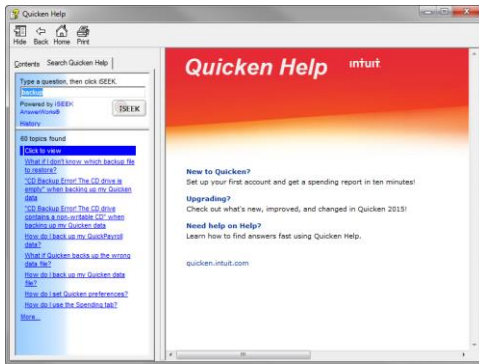
Connect and Update Your Data

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.

Register Quicken (step 1 of 2)

Create your [Intuit ID](#) to get connected

[Already have an Intuit ID?](#)

You can use the same Intuit ID you use for:

- [Quicken.com](#)
- [Investing.Quicken.com](#)
- [TurboTax](#)
- [QuickBooks](#)

Email
Email address This will be your Intuit ID

Password
Password Minimum 6 characters, no spaces.

Confirm Password
Confirm Password

Security Question
What was the name of your first pet?

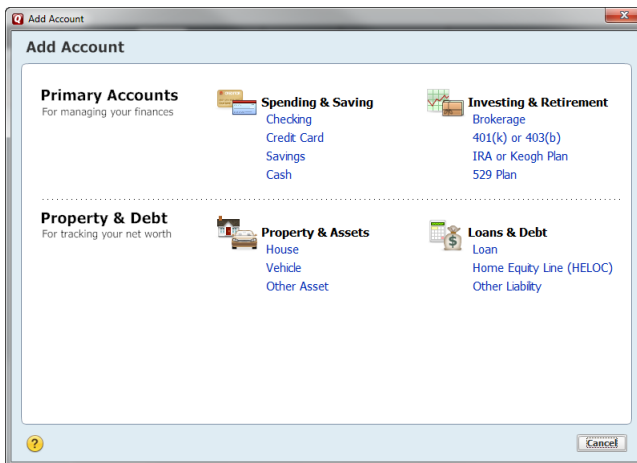
Answer
Answer Use this if you ever need to recover your password.

[Use Quicken without connecting](#)

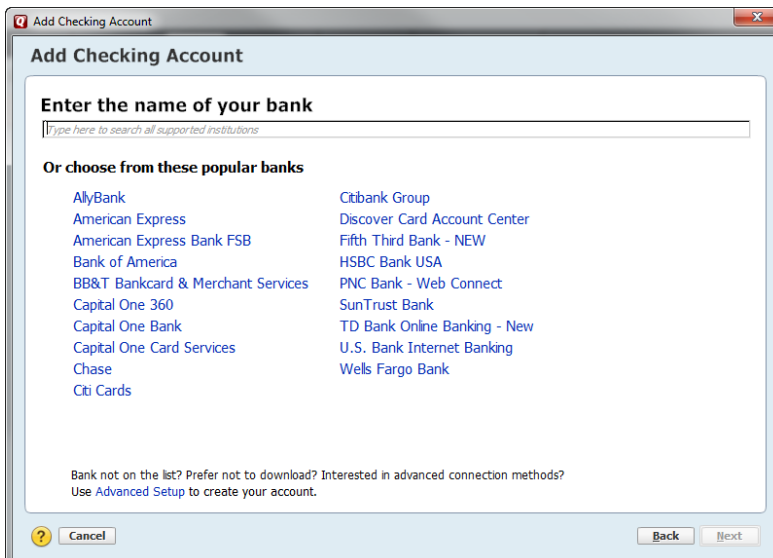
- Fill in the information to set up your Intuit ID and complete your registration
- If you already have an Intuit ID, click the "Already have an Intuit ID" link and sign in to complete your registration

Set Up an Account for Online Banking (Direct Connect)

1. Click **Tools > Add Account...**
2. Click the type of account you want to set up.



3. After you choose the type 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 your financial institution name appears in the filter results, click your financial institution's listing and click **Next**.

IMPORTANT: Be sure to select the correct financial institution, because some financial institutions may appear more than once. If you have any questions about which listing to choose for Direct Connect, please contact your financial institution.

5. Quicken will now display a login screen: type your Direct Connect credentials and follow the prompts to add your accounts to Quicken 2014.

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.

Set Up Bill Pay (Direct Connect)

Some financial institutions offer Direct Connect subscribers the ability to send payments directly from within Quicken. If your financial institution offers Bill Pay services, this feature is turned on during the Direct Connect account setup.

NOTE: Contact your financial institution if you have any questions about Bill Pay enrollment processes and capabilities.

Adding an Online Payee

Sending online payments with Quicken is a fast and easy way to pay your bills. Just add the payment to the Online Payee List once; all Quicken accounts share this list.

1. Choose **Tools > Online Center**.
2. Choose your financial institution from the drop-down list.
3. Select the Payments tab, type your payee's name in the Payee field, and press the TAB key.
4. In the **Set Up Online Payee** window, enter your payee's contact and account information, then click **OK**.
5. Review the information on the **Confirm Online Payee Information** dialog, then click **Accept** to continue (if you need to edit the information, click **Cancel** and make any changes).

Creating an Online Payment

After you have added your online payees, you are ready to create an online bill payment.

1. Choose **Tools > Online Center**.
2. Choose your financial institution from the drop-down list.
3. Select the Payments tab, and type your payee's name in the Payee field.
4. Fill in the remaining fields for the payment that you wish to make (payment amount, processing or delivery date, category, and memo) then click **Enter**.
5. Click **Update/Send...** to send your bill.