

Getting Started with Quicken® 2007 for Windows®

Refer to this guide for instructions about using Quicken's online account services to save time and automatically keep your records up to date.

Before you can download your transactions with Quicken, you need Internet access, your customer ID, and your password.

“Your Quicken Customer ID is your Arizona Federal Account Number. Your Quicken PIN is set up at the time you completed the Arizona Federal Credit Union's Personal Manager registration”

This guide includes the following sections:

- [Downloading the Latest Quicken Update](#)—Describes the steps to download free product updates as they become available for your version of Quicken.
- [Creating a New Quicken Account](#)—Explains how to use Express Setup to create a new Quicken account for downloading transactions and paying bills online.
- [Keeping your Quicken Accounts up to Date](#)—Explains how to download transactions or send payments with accounts that you have activated for online account services.

For step-by-step help with an online task, choose **Help** menu → **Quicken Help**. In the **Type in the word(s) to search for:** prompt, enter **Download Transactions**.

DOWNLOADING THE LATEST QUICKEN UPDATE



1. Click the **Update** icon on the Quicken toolbar.
2. Uncheck all boxes, and click **Update Now** in the **One Step Update Settings** dialog.
3. If an update is available, then Quicken provides a description of the update and brief instructions for downloading the update.
4. When the update completes, restart Quicken.

CREATING A NEW QUICKEN ACCOUNT

1. Choose **Cash Flow** menu → **Cash Flow Accounts** → **Add Account**.
2. In the **This account is held at the following institution:** field, enter Arizoan Federal Credit Union, and click **Next**.

3. If the **Select Bank Location** dialog displays, then choose your location from the list, and click **OK**.
4. With **Yes** selected to connect to your FI through Quicken, click **Next**.
5. Enter your customer ID and password. Enter your password again to confirm it. Click **Next**.

If you are unsure about which ID and password to use, then see the Need a Customer ID and password information to the

6. All downloadable Quicken accounts display. Click to check each account you wish to activate. You can customize the **Quicken Account Name** for each account by typing directly in the field. Click **Next**.

Click here to type your own account name that will display in Quicken.

7. Click **Done** to confirm that the accounts in the list are the ones that you wish to set up.
8. If the **Rename Your Payees** windows displays after the download, then do one of the following:
 - To accept the default name change of one or more payees, check the box next to each payee.
 - To enter a different payee name, check the appropriate payee name, click **Edit**, and follow the on-screen instructions.
 - To leave a payee name unchanged, do not check it.

To apply the payee name changes, click **Apply Settings**. Or, to exit this window with out making changes, click **Cancel**.

9. Review your **One Step Update Summary** page. Click **Close**.

KEEPING YOUR QUICKEN ACCOUNTS UP TO DATE

Update Accounts from the Online Center

The **Online Center** provides additional functions. Within the **Online Center**, you can easily download transactions to, send payments from, or transfer money between the accounts that you have activated for online account services, depending upon which options your financial institution supports.

1. To open the **Online Center**, choose **Online** menu → **Online Center**.

The screenshot shows the Quicken Online Center interface. A red box at the top points to the 'Financial Institution' dropdown menu, which is set to 'DC Bank'. Another red box points to the 'Update/Send...' button. Below the interface, four red boxes provide instructions for the 'Transactions', 'Payments', 'Transfers', and 'E-mail' tabs. The 'Transactions' tab is selected, showing a table with columns for Date, Num, Payee, Payment, and Deposit. The 'Online Balance' for the 'DC Checking' account is \$5.34.

Select the financial institution to manage and update accounts.

Click here to update your accounts with the selected financial institution.

Click the Transactions tab to view your downloaded transactions.

Click the Payments tab to create online payment instructions.

Click the Transfers tab to transfer money between your accounts.

Click the E-mail tab to communicate with your financial institution.



Tip: To update all of your accounts at once, choose **Online** menu → **One Step Update**. Then enter your password in the **One Step Update Settings** dialog, and click **Update Now**.

2. When the update completes, Quicken displays your transactions at Arizona Federal Credit Union. To open your account register, click the appropriate account under the **Cash Flow Center**, located at the left of the Quicken application.

| Cash Flow Center | |
|------------------|-------------------|
| 2 Checking | 5,611.32 |
| Money Market | 156.09 |
| Credit Card | -59.18 |
| LOC | 0.00 |
| | \$5,708.23 |

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

If you have any questions regarding these instructions, you may contact us at 602-683-1088. A customer service representative will be available to assist you from 9:00 A.M. to 7:00 P.M. Monday - Friday. You may also visit the Arizona Federal Credit Union Web site www.azfcu.org or refer to: <http://www.intuit.com/support/quicken>.