

Getting Started with Transaction Download in Quicken for Mac 2006

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

This guide includes the following sections:

Creating a New Quicken Account, page 2—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, page 3—Explains how to download transactions or make payments with accounts that you have activated for online account services.

Information You'll Need to Get Started

To download your transactions with Quicken, you must have Internet access. In addition, to complete setting up your Quicken accounts for transaction download or online bill payment services you will need to enter the following information:

- Customer ID (**Account Number**)
- PIN

Checking: Add K9 to the end of your account number

Savings: Add S0 to the end of your account number

Money Market: Add S6 to the end of your account number

Loans: Add L+ Suffix (1, 2, etc.)

This guide will show you how to setup and download your accounts. For step-by-step help, choose **Quicken Help** from the **Help** menu.

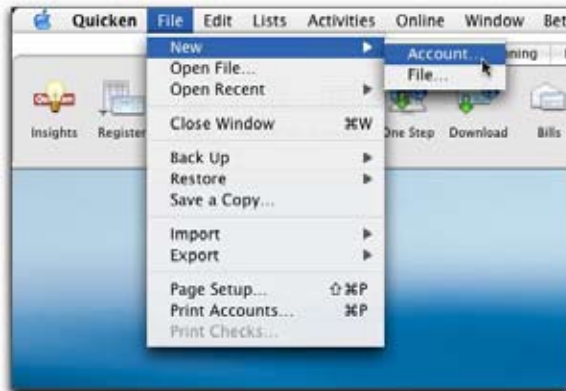
Important: First, get the latest program updates!

From the **Quicken 2006** menu, select **Check for Updates** and follow the on-screen instructions.



Creating a New Quicken Account (Using Express Setup)

Step 1 From the **File** menu, select **New Account**.

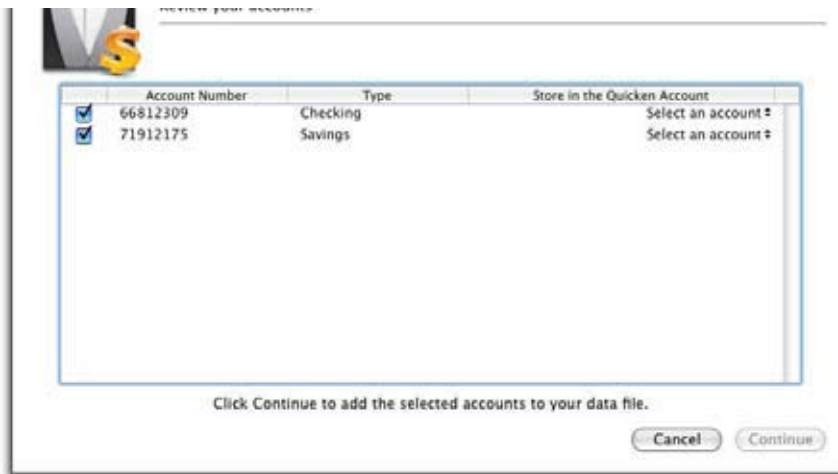


Step 2 In the window that appears **Arizona Federal Credit Union** start typing. Once **Arizona Federal Credit Union** is selected in the list click

Step 3 In the next window click **Continue** to accept the **Online** option.

Step 4 Enter your **Customer ID** and **PIN** in the next window. Quicken goes online to retrieve your account information. **Continue.**

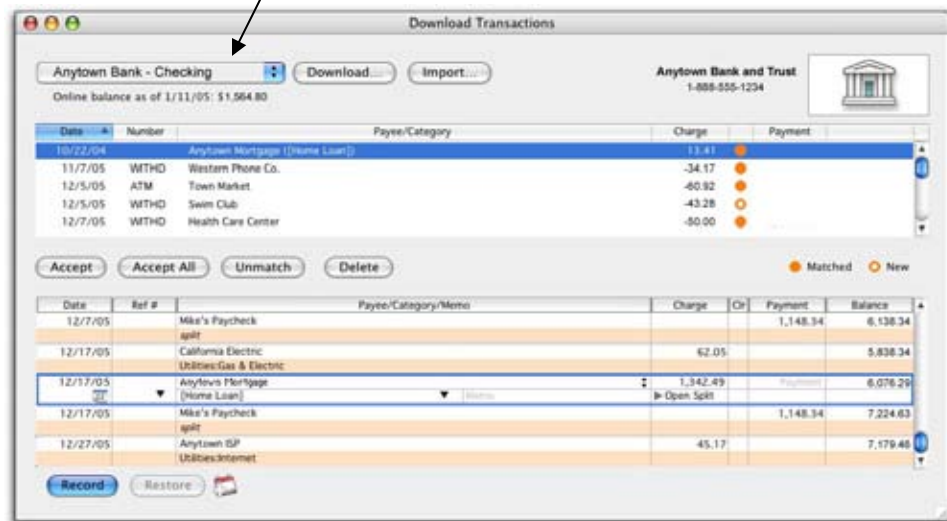
Step 5 Click on **Select an account** to specify a Quicken account name or use an existing Quicken register if you are presently manually entering transactions. Click **Continue** when you have specified how Quicken should handle each online account.



Step 6 Click **Continue** to create all the account registers and download transactions into Quicken. Congratulations! For instructions on downloading account information on an on-going basis, see the “Keeping Your Quicken Accounts Up-to-Date” section.

Keeping Your Quicken Accounts Up-to-Date

- Step 1** From the **Online** menu, select **Download Transactions**.
- Step 2** Choose **Arizona Federal Credit Union** and an account from the selector pop-up menu in the upper left of window.
- Step 3** Click **Download**.



- Step 4** Enter your PIN Vault password or click Bypass PIN Vault and enter the PIN assigned to you by **Arizona Federal Credit Union** for use with Quicken.
- Quicken connects to the Internet and downloads your transactions for all online accounts at **Arizona Federal Credit Union** that you have set up in Quicken.

Working with your downloaded transactions

- Step 1** Select each transaction that you want to add to your register. You can hold down the Command key and click additional transactions to select multiple transactions. If you make a mistake and want to deselect a transaction, click it again.
- Step 2** Click **Accept** to record the selected transactions, or **Accept All** to record all transactions. The accepted items are added to your register, marked C (cleared) and removed from the transaction list.