

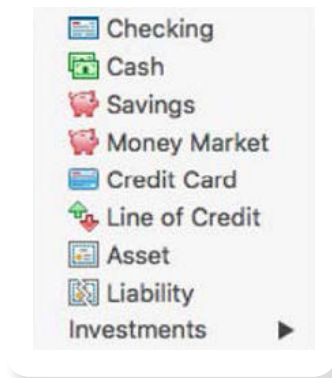
To get started with Quicken® in Mac®, set up an account for online banking, establish bill pay functionality, and create an online payment.

## Setting Up an Account for Online Banking

This procedure allows a Quicken® Mac® user to set up an account for online banking.

1. Open Quicken®, and select **Add Account** in the sidebar.

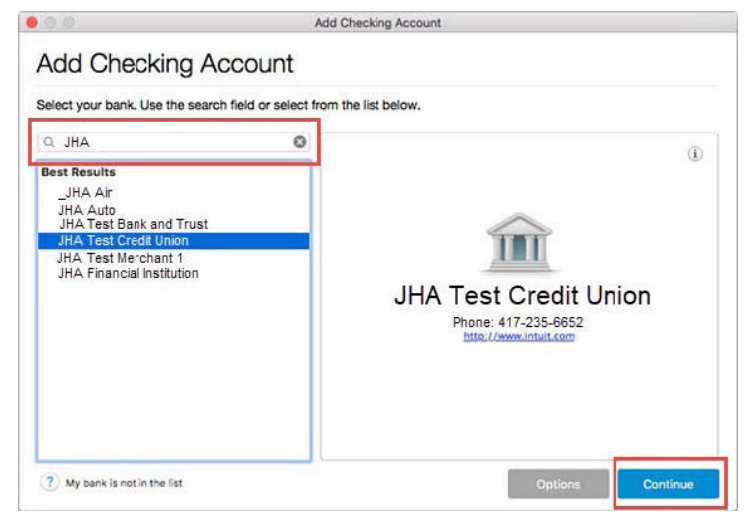
A list of account types appears.



2. Select the type of account you are setting up from the list.

The *Add [account type] Account* screen appears

3. Enter your financial institution in the search bar, select it from the list of financial institutions that appears, and then select **Continue**.



A logon screen appears.

4. Enter your credentials into the **Customer ID:** and **Password/PIN:** fields, and then select **Continue**.
5. Follow any additional prompts given by Quicken®.

## Setting Up Bill Pay Functionality

This procedure allows a Quicken® Mac® user to set up bill pay functionality for an account.

Before completing this procedure, you must be enabled for the bill pay product.

1. Open Quicken® and select the checking account that is linked to bill pay at your financial institution from the sidebar.
2. Select **Settings** in the bottom right of the Quicken® screen
3. Ensure that the **Connection Type** is set to *Direct Connect* and that **Bill Pay** is turned on.

The *Connection Settings* screen appears.

If the connection type is not Direct Connect, then select **Change Connection Type** and then *Direct Connect*. If bill pay is turned off, then you must enable it before continuing.



4. Select **Save**.

## Creating an Online Payment

This procedure allows a Quicken® Mac® user to create an online payment.

Before completing this procedure, you must:

- Be enabled for the bill pay product.
  - Complete the Setting Up Bill Pay Functionality procedure for Quicken® Mac®
1. Open the account register for your bill pay-enabled account.
  2. Select **Online Payment**.
  3. Select the **Pay This Online** check box.
  4. Enter the payee's name into the appropriate field.
  5. Select the date that you want the payment to be received.

This date is normally five days before the pay date, but it can vary according to payees' preferences.

6. Enter the payment amount into the appropriate field.
7. Select one of the following:
  - If you want to send the payment immediately, then select **Send Now**.
  - If you want to send the payment the next time you update the account, then select **Save**.