

How to Get Started with Quicken[®] in Windows[®]



To get started with Quicken[®] in Windows[®], set up an account for online banking, establish bill pay functionality, create a payee, and create a bill payment.

Setting Up an Account for Online Banking

This procedure allows a Quicken[®] user in Windows[®] to set up an account for online banking.

- Open Quicken^{*}, open the **Tools** menu, and then select **Add Accounts**. The *Add Account* window opens.
- 2. Select the type of account you want to set up for online banking.

Primary Accounts For managing your finan	Spending & Saving Checking Credit Card Savings Cash	Investing & Brokerage 401(k) or 403(b) IRA or Keogh Plan 529 Plan
Property & Debt For tracking your net worth	Property & Assets House Vehicle Other Asset	Loans & Debt Loan Home Equity Line (HELOC) Other Liability

After selecting the account type, the Add [account type selected] Account window opens.

3. Enter the name of your financial institution into the field at the top of the window and select it from the list that appears. Select **Advanced Setup** to choose your connection type if needed.

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Now Laris Summit Community C	
Financial Institution not on the list? Prefer not to download? Interested in advanced connection	
Use Advanced Setup to create your	

4. Select **Next** to complete the procedure.

Setting Up Bill Pay Functionality

This procedure allows a Quicken[®] user in Windows[®] to set up bill pay functionality for an account. Before completing this procedure, you must be enabled for the bill pay product.





- Open Quicken^{*}, open the **Tools** menu, and then select **Account List**. The account list opens.
- 2. Select your account from the list and select **Edit**. The *Account Details* window opens.
- 3. Select the **Online Services** tab, locate and open the Online Bill Payment section, and select **Set Up Now**.

General Online Ser	rvices Display Options	
Online Setup Checking 00000 is set up for tra	00 Insaction download. Automatic entry is:	On
Financial Institution: Ba Connection Method: Dir Change connection meti (Recommerded only if y	ink -New rect Connect hod. you are having problems with your curr	Reset Account No account data will be ent method.)
Online Bill Payment	online without	Set up now

The Activate Online Bill Pay window opens.

4. Locate Option 2: Bank and select Activate Now.

NOTE: If the account is not already enabled for bill pay, an error message appears. Additionally, an error appears if you attempt to use any bill pay functionality during Direct Connect synchronization.

Option 2: Bank	-New payment service
 If you've already enrolled in the Bank service, click Activate Now to begin using it. 	-New bill payment
To learn more about the Bank	-New bill payment service,
can() 00.	Already enroled? Activate Now

Creating a Payee

This procedure allows a Quicken[®] user in Windows[®] to create a payee for an account.

Before completing this procedure, you must:

- O Use the Direct Connect connection type.
- O Be enabled for the bill pay product.
- O Complete the Setting Up Bill Pay Functionality procedure for Quicken[®] in Windows[®]





- Open Quicken^{*}, open the **Tools** menu, and then select **Online Payee List**. The *Online Payee List* window opens.
- 2. Select **New** from the bottom of the window.

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User Smith	Unavailable*	24		
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3. Complete the required fields for the new payee, select Ok, and then select Accept.

Creating a Bill Payment Using the Bill Pay Institution Product

This procedure allows a Quicken[®] user in Windows[®] to create a bill payment using the bill pay institution product. Before completing this procedure, you must:

- Use the Direct Connect connection type.
- Be enabled for the bill pay product.
- O Complete the Setting Up Bill Pay Functionality procedure for Quicken® in Windows®
- 1. Open Quicken[®], open the **Tools** menu, and then select **Online Center.** The Online Center window appears.
- 2. Select your financial institution from the Financial Institution drop-down list and select the Payments tab.

			Online Center		- 🗆 🗙
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inancial Institu	tion:				Update/Send
JHA Financia	I Institutio	n 💌			
ransactions	Paymen	ts E-mail(0)			
leared transa	ctions and o	online balances down	loaded on 7/11/2016.		
Account		Transactions	Online Balance		compare to Register
Checking 00	0000	2	86.20		
Date	Num	Payee		Payment	Deposit
		John Doe			
7/25/2016		2011112000			1.02
7/25/2016 7/25/2016		Jane Doe			1.02

3. Select the established payee from the **Payee** drop-down list, enter the details of the payment into the appropriate fields, and then select **Enter**. The Important Date Information from [your financial institution] window appears.



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	r Balance: 84.65
	7/18/2016 🗂 Delivery date 🔽
5 0	× \$ 12.35
3	¥ \$ 12

4. Select Record Check.



5. Select **Update/Send** from the top of the *Online Center* window.

The Online Update for this Account window appears.

6. Enter your online banking password into the Password field and select Update Now.

	Online Update for this acco	ount
5 One Step	Update Settings	
Download Transactic	ns and Balances (Manage Passwords)	<u>e</u>
Process paym	ent of \$12.35 to Jane Doe on 7/18/2016 from Check	ding 000000000 12
) C Show password	characters	C Update Now Cancel

When the update is completed, a confirmation message appears. If the update cannot be completed, details of errors appear. The following causes prevent payments from being made successfully:

- O You are not set up for bill pay services.
- O The payee has been disabled or their account status has been changed.
- O The payee added to Quicken® may not match the bill pay product's expected information for the payee.
- O The payment's details are incorrect.
- O The selected payment processing date has already passed.
- O You are not using the Direct Connect connection type.