

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	Find the second
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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clear Lat's Summit Community C		
Financial Institution not on the list? Prefer not to download? Interested in advanced col	nnection	
Use Advanced Setup to create your		
Cancel	- Back	l
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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 Services Display Options	
Online Setup Chcking 000000 is set up for transaction download. Automatic entry is: Or	Deactivate
Financial Izstitution: Bank -New Connection Method: Direct Connect Change connection method. (Recommerded only if you are having problems with your current	Reset Account (8) No account date will be
Online Bill Payment Pay your bills online without leeving Quicken.	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 call () 00.	-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.

	Unavailable*	_		
and a second sec	Unavailable*			
Card Services	Unavailable*	-		
(der Snith	Unavailable*	10		
2 🚔 New Ed	fit Use Report		Delete	Done
ad time				

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.
- \bigcirc 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.

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ransactions	Payment	s E-mail(0)			
	ctions and o		loaded on 7/11/2016.		Compare to Register
Cleared transa Account Checking 00		nline balances down Transactions 2	loaded on 7/11/2016. Online Balance 86.20		Compare to Register
Account		Transactions	Online Balance	Payment	Compare to Register
Account Checking 00	0000	Transactions 2	Online Balance		

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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Account: Checking 0000	00000 Register Balani	ce: 84.65	
	Processing date 7/18/20	016 🗂 Delivery date 🛛	
Payee John Doe		± \$ 12	35 🗃

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 accou	unt 🔛
🕇 One Step l	Update Settings	
Download Transaction	is and Balances (Manage Passwords)	Dassword
	nt of \$12.35 to Jane Doe on 7/18/2016 from Checking	

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.