KEYSTONE BANK

How to Get Started with Quicken® in Windows®

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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.

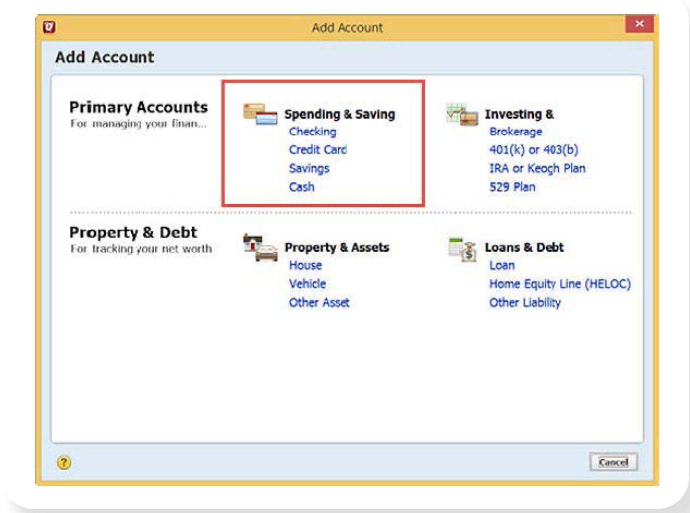
Setting Up an Account for Online Banking

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

1. Open Quicken®, open the **Tools** menu, and then select **Add Accounts.**

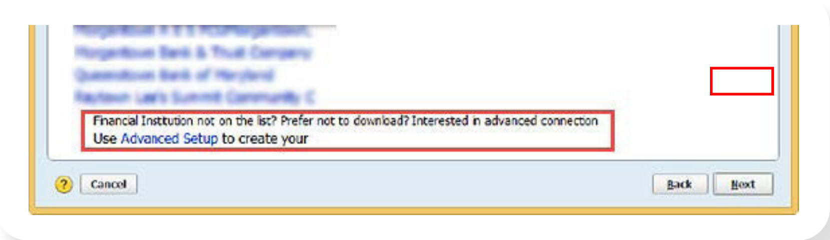
   The *Add Account* window opens.

2. Select the type of account you want to set up for online banking.



   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.



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.

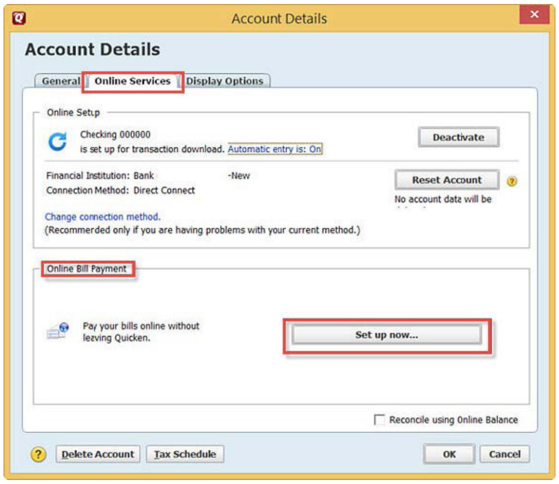
1. Open Quicken® , open the **Tools** menu, and then select **Account List**.

   The account list opens.

2. Select your account from the list and select **Edit**.

   The *Account Details* window opens.

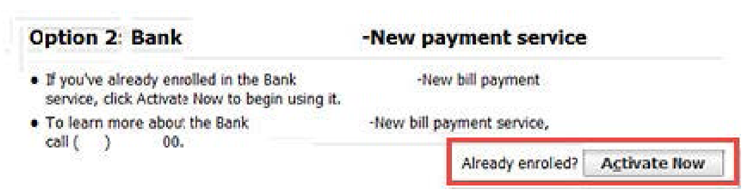
3. Select the **Online Services** tab, locate and open the Online Bill Payment section, and select **Set Up Now**.



   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.



Creating a Payee

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

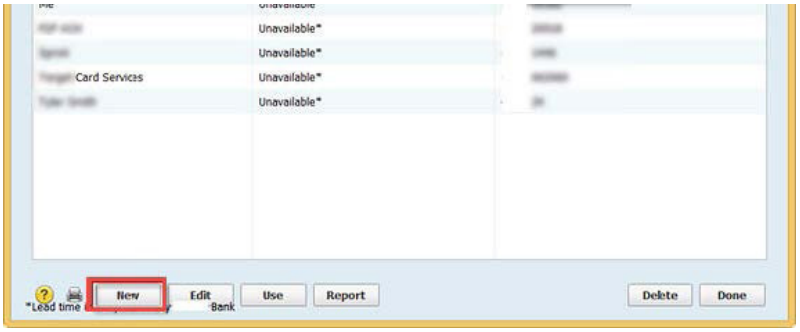
Before completing this procedure, you must:

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

1. 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.



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

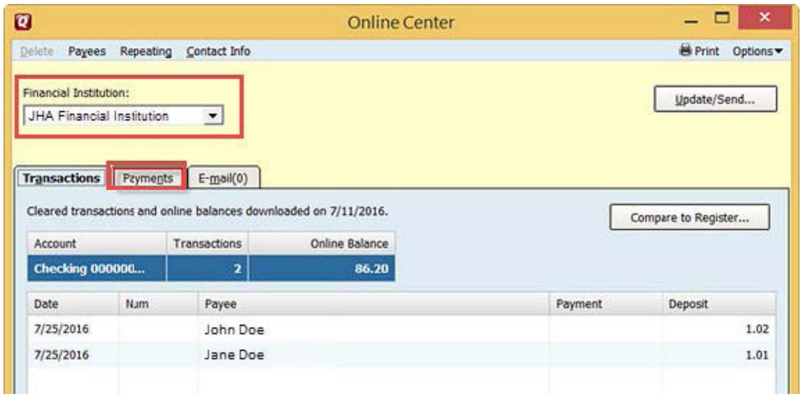
Creating a Bill Payment Using the Bill Pay Institution Product

This procedure allows a Quicken® user in Windows® to create a bill payment using the bill pay institution product.

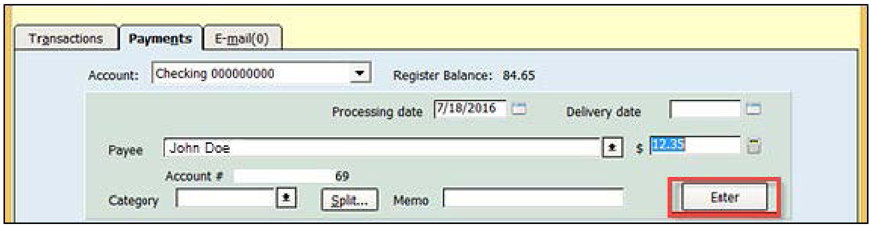
Before completing this procedure, you must:

- Use the Direct Connect connection type.
- Be enabled for the bill pay product.
- 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.



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.

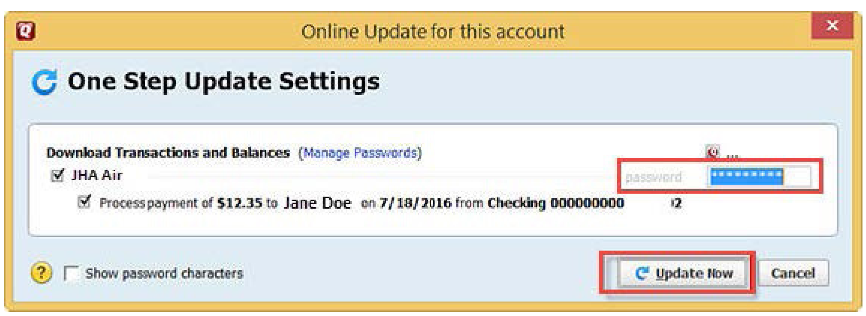


4. Select **Record Check.**

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.**



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:

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