

Getting Started with Transaction Download and Online Bill Payment in Quicken 2004-2006

Refer to this guide for instructions on using Quicken'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 4—Explains how to download transactions or make payments with accounts that you have activated for online account services.

Using Online Bill Payment, page 5—Describes how to set up an online payee and create an online payment.

Information You'll Need to Get Started

To download your transactions with Quicken, you must have Internet access. In addition, you will need to enter a Customer ID and PIN. *Your Quicken Customer ID is the SSN or TIN used when you enrolled for Great Online Banking. The Quicken PIN requires a minimum of 6 characters and a maximum of 8 characters. You will need to complete the Quicken registration at <https://www.greatfloridabankcm.com/onlineserv/OFX/OFXRegister.cgi> to create your Quicken PIN.*

This guide will show you how to setup and download your accounts. For step-by-step help with an online task, choose **Learn About Downloading Transactions** from the Quicken **Help** menu.

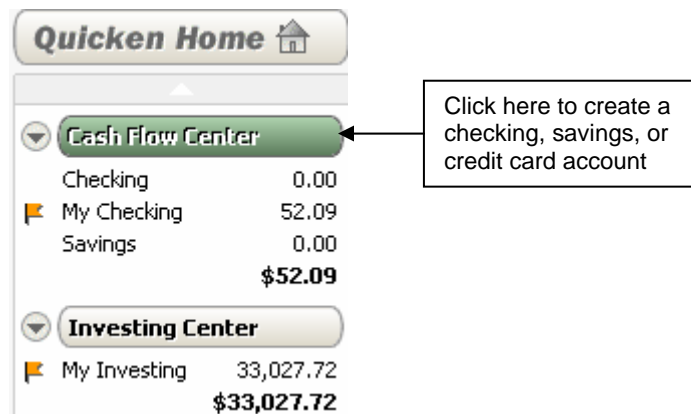
Important: First, get the latest program updates!



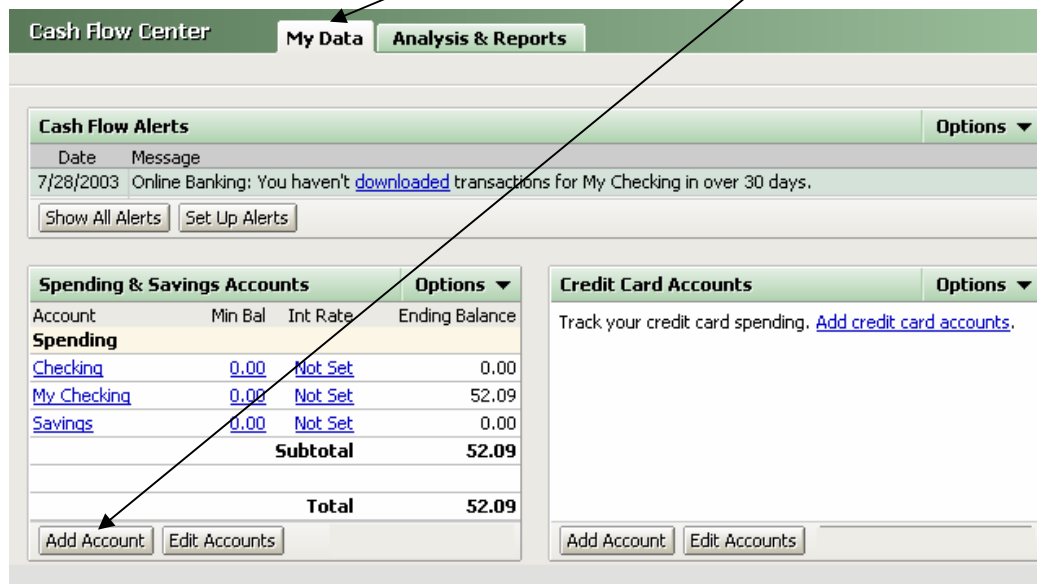
To get the latest directory of participating financial institutions and program updates click **Update** on your Quicken toolbar. In the dialog, click **Update Now**, Quicken will automatically check for available updates. When this download process is complete, **exit** and **restart** Quicken.

Creating a New Quicken Account (Using Express Setup)

Step 1 From the Account Bar, click **Cash Flow Center**.



Step 2 In the Cash Flow Center, click the **My Data** tab and then click **Add Account**.



Step 3 Enter **Great Florida Bank** in the financial institution selection dialog and click **Next**.

Step 4 Click **Next** to accept the **Online** option in this dialog. Note, that you can download any of the account types listed under **Download Availability**.

Step 5 The next dialog asks for your **Customer ID** and **PIN**, enter this information. If you're unsure about which ID/PIN to use, see the information under "Need a Customer ID and PIN?" to the right in this dialog. Click **Next**.

Step 6 Specify a Quicken account name, or use an existing Quicken register if you are presently manually entering transactions. Click **Next** when you have specified how Quicken should handle each online account.

The screenshot shows the "Quicken Account Setup" dialog box. At the top, it says "Quicken detected the following account(s) at Federal Credit Union. Enter a name for each account you would like to add into Quicken." Below this is a table with two columns: "Federal Credit Union Account" and "Quicken Account Name".

Federal Credit Union Account		Quicken Account Name
<input checked="" type="checkbox"/> Add	Savings, 50009787-01	My Savings
<input checked="" type="checkbox"/> Add	Money Market, 50009787-02	My Money Mar
<input checked="" type="checkbox"/> Add	Checking, 50009787-09	<enter a name>

At the bottom of the dialog are three buttons: "Cancel", "Help", and "Next".

Callout boxes provide additional instructions:

- A box on the left points to the "Add" checkboxes: "To ignore the selected online account, click the **Add** checkbox. Quicken will not download transactions from this online account".
- A box on the right points to the "Quicken Account Name" column: "Simply name each account that you'd like to add to Quicken".
- A box on the right points to the "Next" button: "... then click **Next**".

Step 7 Click **Next** to create up to 6 account registers and download transactions into Quicken. Repeat this setup process if you hold any additional accounts. 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

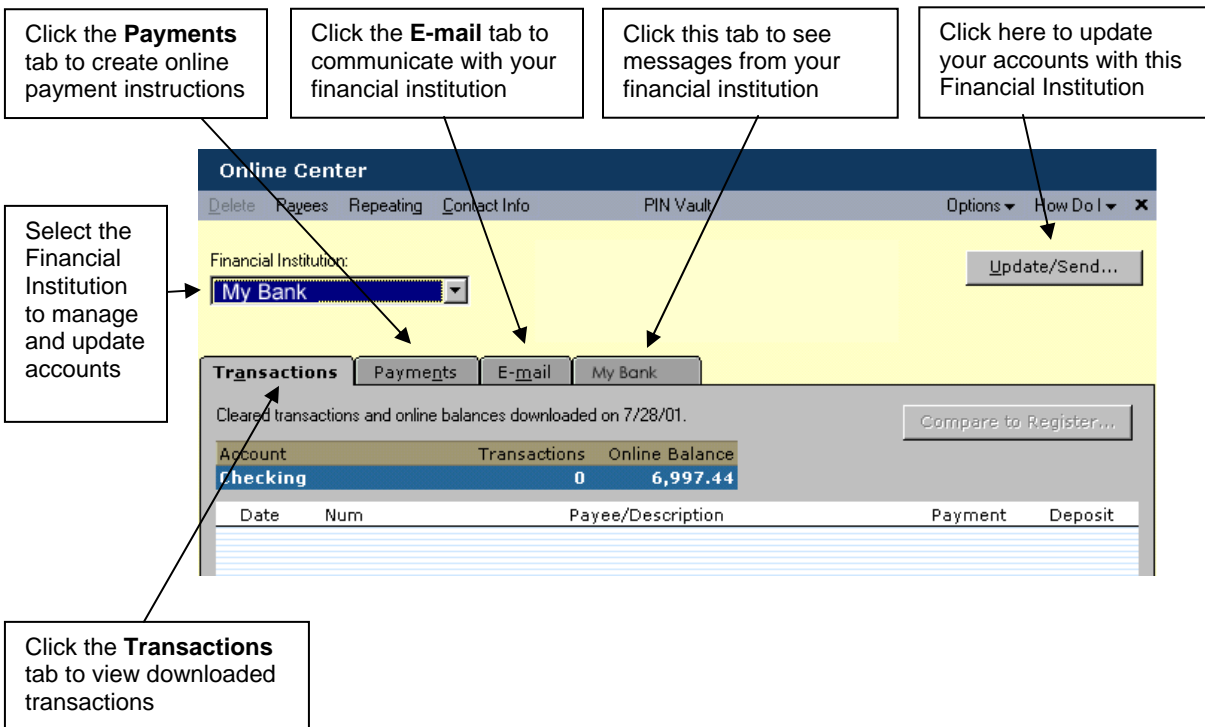
- Step 1** To download transactions or send online payments directly from your account register, go to the account via the account bar, and then click **Download Transactions** located at the bottom of your account register.
- Step 2** Follow the on-screen instructions to complete downloading transactions.



Updating Accounts from the Online Center

The **Online Center** also lets you easily download transactions to or make payments from the accounts that you have activated for online account services.

Easy Access: From the **Online** menu, select **Online Center**.



Using Online Bill Payment

Sending online payments with Quicken is a fast and easy way to pay your bills. It requires two steps: setting up an online payee and creating an online payment.

Set Up an Online Payee

An online payee can be any business, organization, or individual to whom you make payments. You have to add each online payee to the **Online Payee List** only once; all Quicken accounts share this list.

- Step 1** Click **Make an Online Payment** from the online toolbar
(See previous section - Keeping your Quicken Accounts Up-To-Date)
- Step 2** Click **Payees** in the **Online Center**. (See illustration on next page.)
- Step 3** Select the **New** button in the top left area of the **Online Payees Window**.
- Step 4** In the **Set Up Online Payee** window, enter the payee's name and address.
- Step 5** Enter the account number that the payee uses to identify you. If you don't have an account number, use your policy number or your name.
- Step 6** Click **OK**. Review the information for accuracy and click **Accept**.
To edit, click **Cancel** and make any necessary changes.

Create an Online Payment

After you create an online payee, you are ready to create an online payment.

- Step 1** Click **Make an Online Payment** from the online toolbar
(See previous section - Keeping your Quicken Accounts Up-To-Date)
- Step 2** Fill in the fields for the payment that you want to make and click **Enter**.
- Step 3** Click **Update/Send**.
Quicken displays the **Online Update for this account** window. Check marks indicate payments to be sent. If you do not want to send a payment, click the payment to remove the check mark.
- Step 4** Enter your PIN and click **Update Now**.
You will connect to the Internet and your payment instructions will be sent.

Existing Web Connect Users

To activate an existing account for online access in Quicken 2006, 2005, 2004 or 2003:

1. Choose Tools **menu** > **Account List**.
2. Select the account you want to activate, and click **Edit**.
3. In the Financial Institution field, begin typing our bank's name "Great Florida Bank"
4. Click the **Online Services** tab.
5. Click **Activate** next to the service you want to use.
6. Follow the on-screen instructions, and enter the information provided by Great Florida Bank.

7. Once you have successfully completed this process, Activated appears in the Online Services column in the Account List window.

When the download is complete, the available account history appears on your register. On your first download, Quicken accepts the transactions. On the future downloads you will need to accept the transactions after a download.

Compare the downloaded transactions with your account register. You need to match your downloaded transaction.

- a. If the selected transaction is not currently marked as Matched, but should be matched to one or more transactions already in your Quicken register, click **Edit**, and choose **Match Manually**. Quicken opens a window to allow you select one to more transactions. If you select more than one transaction when manually matching, Quicken enters a split transaction and line for difference in amounts, if any.
- b. If the transaction is matched in error, and may match another transaction, click **Edit**, and choose **Unmatch**. Quicken attempts to match the transaction again. If no transactions are close enough, Quicken changes the transaction's status to New.