



This “Getting Started” guide is provided by Ent to assist you with connecting to Online Banking with Quicken 2007-2008. You will need your Ent account number and your Online Banking PIN number.

### **Getting Started with Quicken 2007-2008**

Refer to this guide for instructions about using Quicken’s online account services to save time and automatically keep your records up to date.

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#### **Information You’ll Need to Get Started**

To download your transactions with Quicken, you must have Internet access. In addition, to complete setting up your Quicken accounts for transaction download or online bill payment services you will need to enter a Customer ID and PIN.

Your Quicken Customer ID/PIN is the same as your Ent Account Number and PIN used to log on to Online Banking and Telephone Banking.

**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.

- Keeping your Quicken Accounts up to Date—Explains how to download transactions or send payments with accounts that you have activated for online account services.

For step-by-step help with an online task, choose Help menu. Quicken Help. In the Type in the word(s) to search for: prompt, enter Download Transactions.

## **DOWNLOADING THE LATEST QUICKEN UPDATE**



1. Click the Update icon on the Quicken toolbar.
2. Uncheck all boxes, and click Update Now in the One Step Update Settings dialog.
3. If an update is available, then Quicken provides a description of the update and brief instructions for downloading the update.
4. When the update completes, restart Quicken.

## **CREATING A NEW QUICKEN ACCOUNT**

1. Choose Cash Flow menu → Cash Flow Accounts → Add Account.
2. In the "This account is held at the following institution": field, enter Ent Federal Credit Union, and click Next.
3. If the Select Bank Location dialog displays, then choose your location from the list, and click OK.
4. With Yes selected to connect to your FI through Quicken, click Next.
5. Enter your customer ID and password. Enter your password again to confirm it. Click Next. With Yes selected to connect to your FI through Quicken, click Next.
6. All downloadable Quicken accounts display. Click to check each account you wish to activate. You can customize the Quicken Account Name for each account by typing directly in the field. Click Next.
7. Click Done to confirm that the accounts in the list are the ones that you wish to set up.
8. If the Rename Your Payees windows displays after the download, then do one of the following:
  - To accept the default name change of one or more payees, check the box next to each payee.
  - To enter a different payee name, check the appropriate payee name, click Edit, and follow the on-screen instructions.
  - To leave a payee name unchanged, do not check it.

To apply the payee name changes, click Apply Settings. Or, to exit this window without making changes, click Cancel.

9. Review your One Step Update Summary page. Click Close.

## **KEEPING YOUR QUICKEN ACCOUNTS UP TO DATE**

Update Accounts from the Online Center

The Online Center provides additional functions. Within the Online Center, you can easily download transactions to, send payments from, or transfer money between the accounts that you have activated for online account services, depending upon which options your financial institution supports.

1. To open the Online Center, choose Online menu. Online Center.

Tip: To update all of your accounts at once, choose Online menu. One Step Update. Then enter your password in the One Step Update Settings dialog, and click Update Now.

2. When the update completes, Quicken displays your transactions at Ent Federal Credit Union. To open your account register, click the appropriate account under the Cash Flow Center, located at the left of the Quicken application.