



This “Getting Started” guide is provided by Ent to assist you with connecting to Online Banking with Quicken 2009. You will need your Ent account number and your Online Banking PIN number.

### **Getting Started with Quicken 2009**

This guide includes the following sections:

- Creating a New Quicken Account - explains how to create a new Quicken account for downloading transactions.
- Keeping your Quicken Accounts Up-to-Date shows how to complete a “One-Step” update for the next time you log on to Quicken.

Information You Will Need to Get Started:

- To download your Ent account information and transactions into Quicken, you must have Internet access. In addition, to complete the set up of your Quicken accounts for transaction you will need to enter a Customer ID and PIN (Your Ent Account number and PIN).

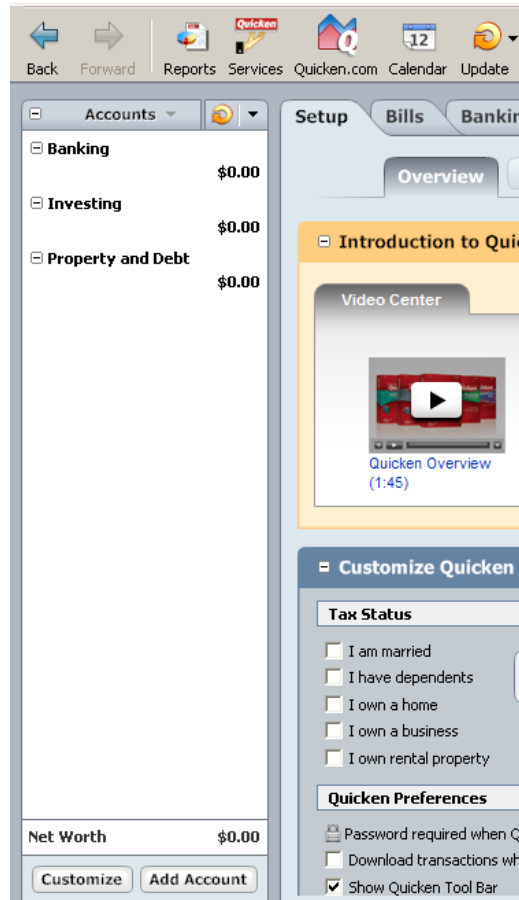
This guide will show you how to setup and download your accounts. For step-by-step help with an online task, choose “Learn About Downloading Transactions” from the Quicken Help menu.

## Creating a New Quicken Account

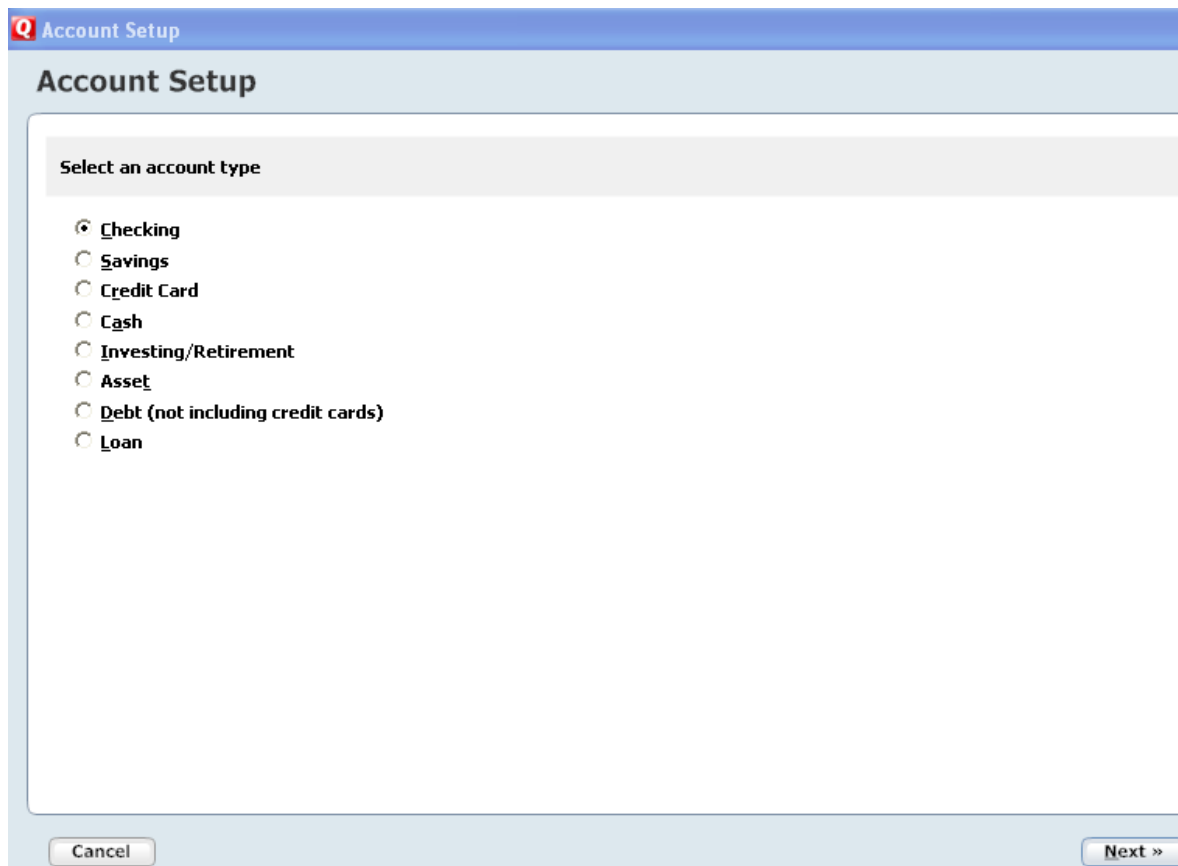
**Step 1** From the Account Bar, go to Tools and Setup

**Step 2** In the Accounts section on the left bottom click Add Account

Add Account



**Step 3** Enter the account type to setup and click Next.



The screenshot shows a dialog box titled "Account Setup" with a blue header bar. Below the header, the title "Account Setup" is repeated in a larger font. The main area contains a section titled "Select an account type" with a list of radio button options: "Checking" (selected), "Savings", "Credit Card", "Cash", "Investing/Retirement", "Asset", "Debt (not including credit cards)", and "Loan". At the bottom left is a "Cancel" button, and at the bottom right is a "Next >>" button.

Account Setup

Account Setup

Select an account type

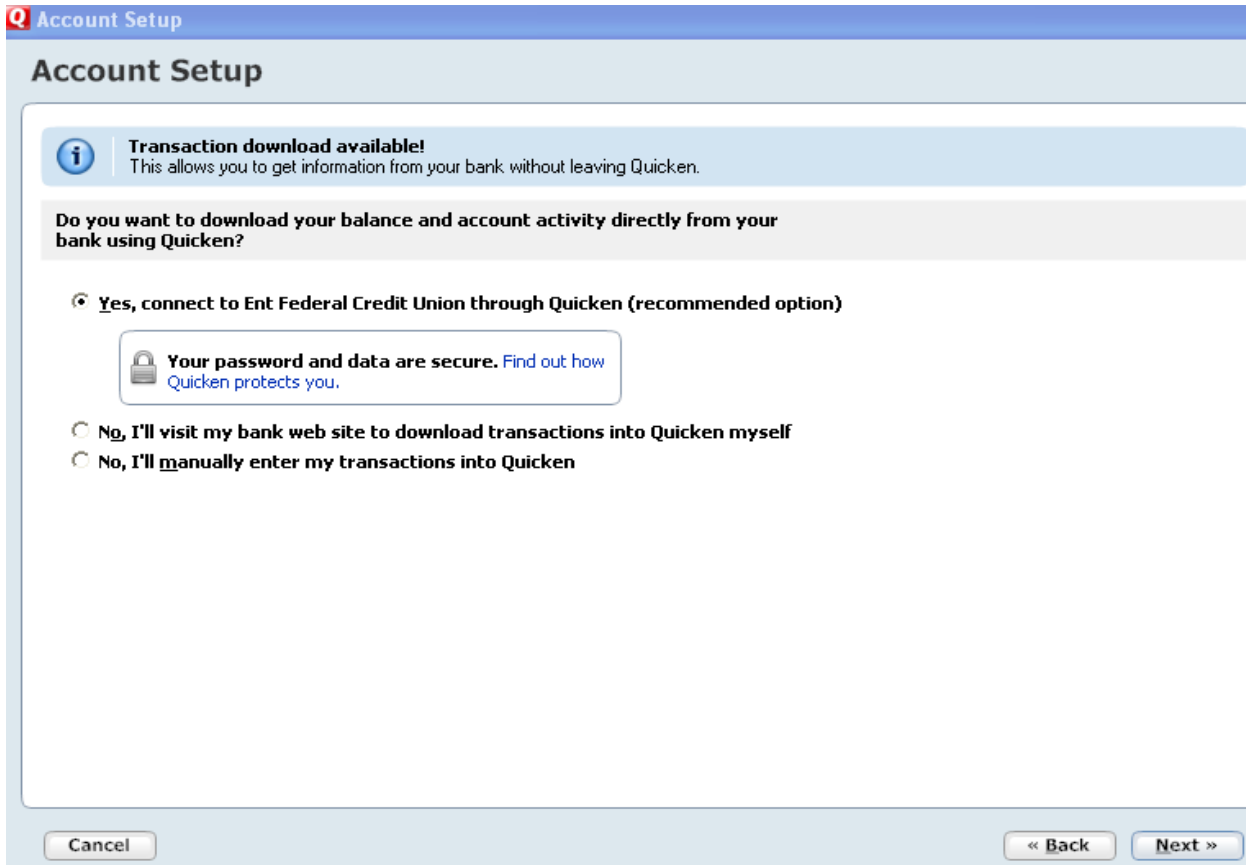
- Checking
- Savings
- Credit Card
- Cash
- Investing/Retirement
- Asset
- Debt (not including credit cards)
- Loan

Cancel Next >>

**Step 4** Enter Ent Federal Credit Union in the Name field and click Next.

The screenshot shows the 'Account Setup' dialog box in Quicken. The title bar is blue with the Quicken logo and the text 'Account Setup'. The main window has a light blue header with the text 'Account Setup'. Below the header is a grey bar with the question 'What is the financial institution for this account?'. There are two radio button options. The first option, 'The account is held at the following institution', is selected. Below it is the instruction 'Select a letter or phrase to find your financial institution' followed by a row of buttons labeled with letters A through Z. Below the letters are three buttons: 'Bank of ...', 'First ...', and '1st ...'. Below these buttons is a text input field with the instruction 'Enter the name of your financial institution or select from a list by clicking the buttons above.' Below the input field is a security message: 'Your password and data are secure. Find out how Quicken protects you.' The second radio button option is 'I do not want to enter my financial institution', with a note below it: 'Note: Selecting this option means you will not be able to download transactions from your financial institution into Quicken. What does this mean?'. At the bottom of the dialog box are three buttons: 'Cancel', '<< Back', and 'Next >>'.

**Step 5** The next dialog asks how you would like to download your information. The recommended option is to choose “Yes, connect to Ent Federal Credit Union through Quicken.” Click Next to continue.



**Step 6** Enter your Ent account number in the Ent Federal Credit Union User ID/ username area. Enter your Ent Online Banking PIN in the area indicated. Click Next to continue.

The screenshot shows the 'Account Setup' window in Quicken. At the top, there is a blue header with the Quicken logo and the text 'Account Setup'. Below the header, the main title 'Account Setup' is displayed. A light blue information banner contains an 'i' icon and the text: 'Transaction download available! This allows you to get information from your bank without leaving Quicken.' Below this banner, a grey bar reads 'Log in to enable transaction download in Quicken'. There are two radio button options for logging in. The first option, 'Log in using my Ent Federal Credit Union ID and Password', is selected. This option includes three input fields: 'Ent Federal Credit Union User ID / username', 'Ent Federal Credit Union password', and 'Reenter password'. To the right of these fields is a box titled 'Ent Federal Credit Union' with a bullet point: 'Your Quicken login is the same as your login to the Ent Federal Credit Union Web site'. Below the input fields is a security notice: 'Your password and data are secure. Find out how Quicken protects you.' The second radio button option is 'I do not have a Ent Federal Credit Union user name and password (I have never logged in to my Ent Federal Credit Union web site)'. At the bottom of the window, there are three buttons: 'Cancel', '<< Back', and 'Next >>'.

**Account Setup**

**Transaction download available!**  
This allows you to get information from your bank without leaving Quicken.

**Log in to enable transaction download in Quicken**

**Log in using my Ent Federal Credit Union ID and Password**

Ent Federal Credit Union User ID / username

Ent Federal Credit Union password

Reenter password

**Ent Federal Credit Union**

- Your Quicken login is the same as your login to the Ent Federal Credit Union Web site

**Your password and data are secure.** [Find out how Quicken protects you.](#)

**I do not have a Ent Federal Credit Union user name and password**  
(I have never logged in to my Ent Federal Credit Union web site)

**Step 7** The connection update will take place from Ent.

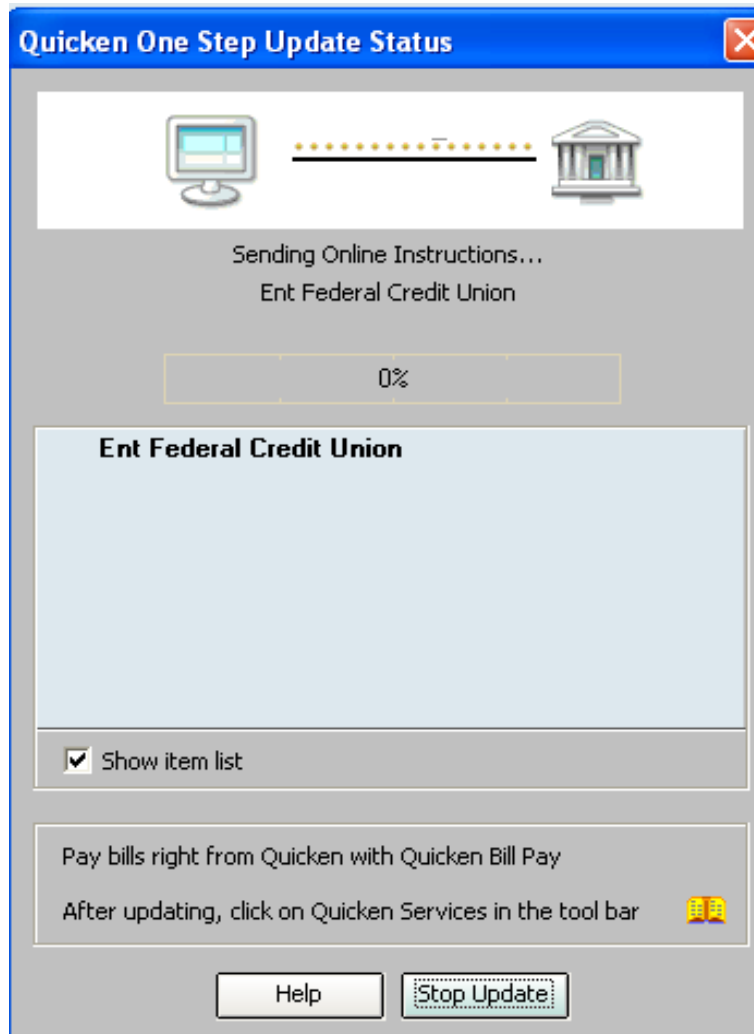


**Step 8** Select the appropriate accounts to add to Quicken and click Next to continue. You can also add an account Nickname in the Account Name area at this point.

Select	Account	Type	Account Name (to use in Quicken)
<input checked="" type="checkbox"/>	TEST PRIMARY SAVINGS	Savings	<input type="radio"/> New In Quicken <input type="text" value="Enter account nickname"/> <input type="radio"/> Exists In Quicken
<input checked="" type="checkbox"/>	TEST VALUE CHECKING	Checking	<input type="radio"/> New In Quicken <input type="text" value="Enter account nickname"/> <input type="radio"/> Exists In Quicken

Cancel Next »

**Step 9** The Quicken One Step Update status will run.



**Step 10** You will be asked if you would like to store your password (Ent PIN) in the Password Vault. Choose your option and click Next to continue.

**Account Setup**

**Keep your financial institution password in Quicken's secure Password Vault**  
This allows you to access all of your connected accounts with one password.

**Would you like to store your password in the Password Vault?**

Financial Institution **Ent Federal Credit Union**  
User ID   
Password

**Yes**

**Password for the Password Vault**   
The password you entered when you set up your Password

**Your password and data are secure.** [Find out how Quicken protects you.](#)

**No (I'll enter my financial institution password each time I download transactions.)**

**Step 11** Account Setup and Summary of Accounts added. Click “Done” to continue.

**Account Setup**

**Setup Complete**

**Summary of accounts added**

Account	Type	Connection Type	Transactions Downloaded	Online Bill Pay
TEST PRIMARY SAVINGS	Savings	Direct Connect	9	<input type="checkbox"/>
TEST VALUE CHECKING	Checking	Direct Connect	9	<input type="checkbox"/>

**Next Steps**

- View the **flagged accounts** to **review and accept** your downloaded transactions. (You will do this each time you download new account activity)
- Check the **To Do** tab in Quicken for other suggestions on how to make the most of Quicken.

**Done**

**Step 12** You will be returned to the main page and your account balance/ information will display on the left side of the page in the Accounts Area.

To complete a one-step update the next time you log on click the update icon



in the Accounts area to complete.

The screenshot shows the Quicken 2009 web interface. On the left, the 'Accounts' area displays a list of accounts under 'Banking', 'Investing', and 'Property and Debt'. The total balance for the banking accounts is \$47.54. The main content area has tabs for 'Setup', 'Bills', 'Banking', 'Investing', 'Net Worth', 'Planning', 'Tax', and 'Quicken Picks'. Below the tabs is a 'Video Center' with several video thumbnails. At the bottom is a 'Customize Quicken' section with checkboxes for tax status and preferences.

Category	Item	Value
Banking	TEST VA...	10.00
	TEST PR...	37.54
	<b>Total</b>	<b>\$47.54</b>
Investing		\$0.00
Property and Debt		\$0.00

Section	Item	Value/Status
Tax Status	I am married	<input type="checkbox"/>
	I have dependents	<input type="checkbox"/>
	I own a home	<input type="checkbox"/>
	I own a business	<input type="checkbox"/>
	I own rental property	<input type="checkbox"/>
Quicken Preferences	Password required when Quicken starts: No (change)	<input type="checkbox"/>
	Download transactions when Quicken starts	<input type="checkbox"/>
	Show Quicken Tool Bar	<input checked="" type="checkbox"/>

Section	Show	Start On	Tab
Quicken Tabs	<input checked="" type="checkbox"/>	<input type="radio"/>	Setup
	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	Bills
	<input type="checkbox"/>	<input type="radio"/>	My Pages
	<input checked="" type="checkbox"/>	<input type="radio"/>	Banking
	<input checked="" type="checkbox"/>	<input type="radio"/>	Investing
	<input checked="" type="checkbox"/>	<input type="radio"/>	Net Worth
	<input checked="" type="checkbox"/>	<input type="radio"/>	Planning
	<input checked="" type="checkbox"/>	<input type="radio"/>	Tax
<input checked="" type="checkbox"/>	<input type="radio"/>	Quicken Picks	