

Getting Started with Quicken® 2007 for Mac®



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

Before you can download your transactions with Quicken, you must have Internet access, your Customer ID, and PIN.

1. Your Customer ID. To receive a Customer ID for Online Banking through Quicken please enroll online at <https://www.citizensbankonline.com/pfm/enroll.htm> or call 800 723-0777.
2. Your Personal Identification Number (PIN) or password. This is not the same as your Online Banking or ATM/Debit card PIN or Password. To receive a Password for Online Banking through Quicken please enroll online at <https://www.citizensbankonline.com/pfm/enroll.htm> or call 800 723-0777.

For step-by-step help with an online task, choose **Help** menu → **Quicken 2007 Help**.

This guide includes the following sections:

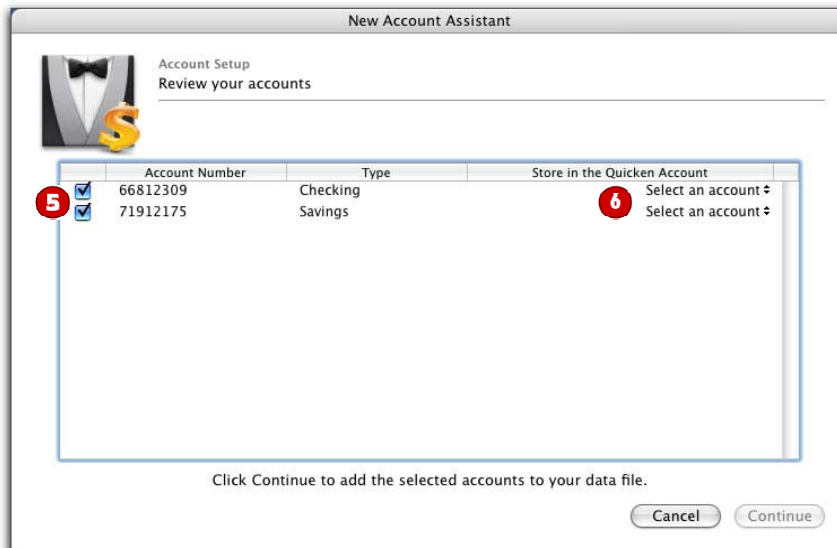
- [Downloading the Latest Quicken Update](#)—Describes the steps to download free product updates as they become available for your version of Quicken.
- [Creating a New Quicken Account \(Using Express Setup\)](#)—Explains how to use Express Setup to create a new Quicken account for downloading transactions and paying bills online.
- [Keeping your Quicken Accounts up to Date](#)—Explains how to download transactions or send payments with accounts that you have activated for online account services.
- [Using Online Bill Payment](#)—Describes how to set up an online payee and create an online payment.

DOWNLOADING THE LATEST QUICKEN UPDATE

1. Choose **Quicken 2007** menu → **Check for Updates**.
2. Follow the on-screen instructions.

CREATING A NEW QUICKEN ACCOUNT

1. Choose **File** menu → **New** → **Account**.
2. In the account setup window that appears, start typing **Citizens Bank**. Select the **Citizens Bank-New England Consumer** for personal accounts or **Citizens Bank-New England Business** for business accounts if you are a New England customer. If you are a Mid-Atlantic customer, please choose **Citizens Bank Mid-Atlantic Consumer** for personal accounts or **Citizens Bank Mid-Atlantic Business** for business accounts in the list, and click **Continue**.
3. Click **Continue** to accept the **Online** option.
4. Enter your **Customer ID** and **PIN**, and click **Continue**. Quicken goes online to retrieve your account information.

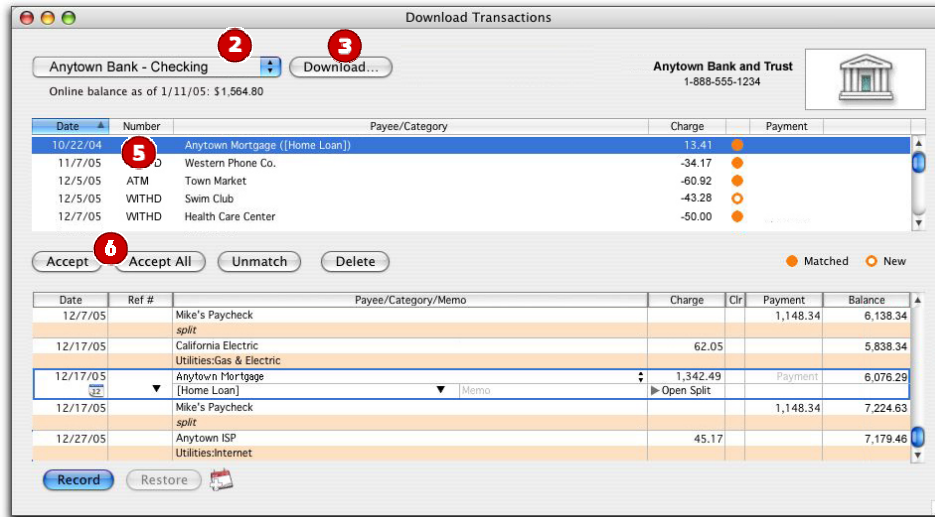


5. Uncheck any account that you do not want to set up.
6. Click **Select an Account** to specify a Quicken account name or to use an existing register if you are presently manually entering transactions. Click **Continue** when you have specified how Quicken should handle each online account.
7. Click **OK** to view the account registers.

KEEPING YOUR QUICKEN ACCOUNTS UP TO DATE

Download Transactions into your Account Register

1. Choose **Online** menu → **Download Transactions**.
2. Choose **Citizens Bank** and an account from the pop-up menu in the upper left of the window.



3. Click **Download**.
4. Enter your PIN or PIN Vault password assigned to you by Citizens Bank for use with Quicken. Click **OK**.

Quicken connects to the Internet and downloads your transactions for all online accounts at Citizens Bank that you have set up in Quicken.

Working with your Downloaded Transactions

5. Click to select each transaction that you want to add to your register. You can hold down the **SHIFT** key and click additional transactions to select multiple transactions. If you make a mistake and want to deselect a transaction, click it again.
6. Click **Accept** to record the selected transactions or **Accept All** to record all transactions. The accepted items are added to your register, marked C (cleared), and removed from the transaction list.

USING ONLINE BILL PAYMENT

Sending online payments with Quicken is a fast and easy way to pay your bills. It requires only 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 **Payees** list only once; all Quicken accounts share this list.

Choose **Online** menu → **Payments** → **Online Payees**.

1. Click **New**, and complete all fields in the **Set Up Payee** dialog. Click **Create**.
2. Review the information for accuracy and click **Yes**. To edit, click **NO** and make any necessary changes.

Create an Online Payment

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

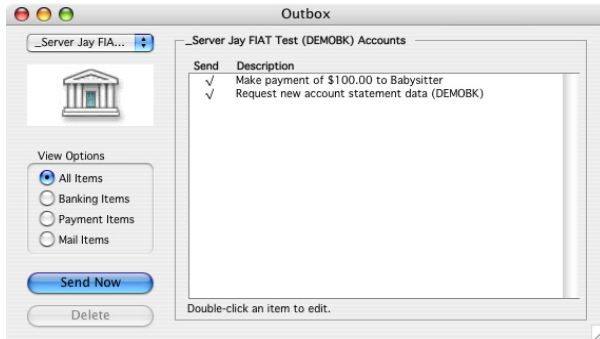
1. Choose **Online** menu → **Payments** → **Enter Payment**.



2. In the **Enter Online Payment** window, enter the name of the online payee you just set up. Enter the amount of the payment and, optionally, the category.
3. Click **Put in Outbox**.

Quicken saves this payment in the Outbox. You can create other online payments and add them to the Outbox as well.

4. When you are ready to send your payments, choose **Online** menu → **Outbox**. Click **Send Now**.



5. Enter your PIN or PIN Vault password for Citizens Bank. You connect to the Internet, and your payment instructions are sent.

6. Quicken summarizes your instructions in the **Online Transaction Summary**. Click **OK**.

Tip: Choose **Online** menu → **One Step Update...** to download transactions and send payment instructions for all accounts at one time.

CONGRATULATIONS, YOU ARE SET UP AND READY TO USE QUICKEN!

If you have any questions regarding these instructions, you may also contact us at 800 723-0777. A customer service representative will be available to assist you from 6:00A.M. to 7:00P.M. Mon - Fri. You may also visit the Citizens Bank Web site at <http://www.citizensbank.com> or refer to: <http://www.intuit.com/support/quicken>.