

GETTING STARTED WITH QUICKEN®

2010, 2009, and 2008 for Windows®



Refer to this guide for instructions on how to use Quicken's online account services to save time and automatically keep your records up to date. This guide will be broken up into product versions, please be sure to follow the steps that apply to the version of Quicken you are currently utilizing.

Before you can download your transactions with Quicken you will need internet access, your customer ID and password. *

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.

This Getting Started Guide contains the following information:

- **Downloading the Latest Quicken Updates-** How to download free product updates as they become available for your version of Quicken.
- **Creating a New Quicken Account-** How to use the Express Setup to create a new Quicken account for downloading transactions and paying bills online.
- **Keeping Your Quicken Accounts Up to Date-** How to download transactions or send payments with accounts that you have activated for online account services.
- **Using Online Bill Payment-** How to set up an online payee and create an online payment.

Click the version you are looking for

- 2010 - [CREATING A NEW QUICKEN ACCOUNT 2010](#)
- 2009 - [CREATING A NEW QUICKEN ACCOUNT 2009](#)
- 2008 - [CREATING A NEW QUICKEN ACCOUNT 2008](#)

For step-by-step instructions with an online task (or any other Quicken question) go to Help → Quicken Help → select the Search Quick Help tab and type in the topic and click Ask.

DOWNLOADING THE LATEST QUICKEN® UPDATE (Applies to all product versions)



1. Click the Update icon on the Quicken toolbar.
2. Uncheck all boxes → Update Now in the One Step Update Settings dialog.
3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.
4. When the update is completed, close Quicken. Reopen Quicken.

DOWNLOAD OPTION (Applies to all product versions)



Direct Connect vs. Express Web Connect vs. Web Connect: Quicken offers several methods for you to connect to your financial institution.

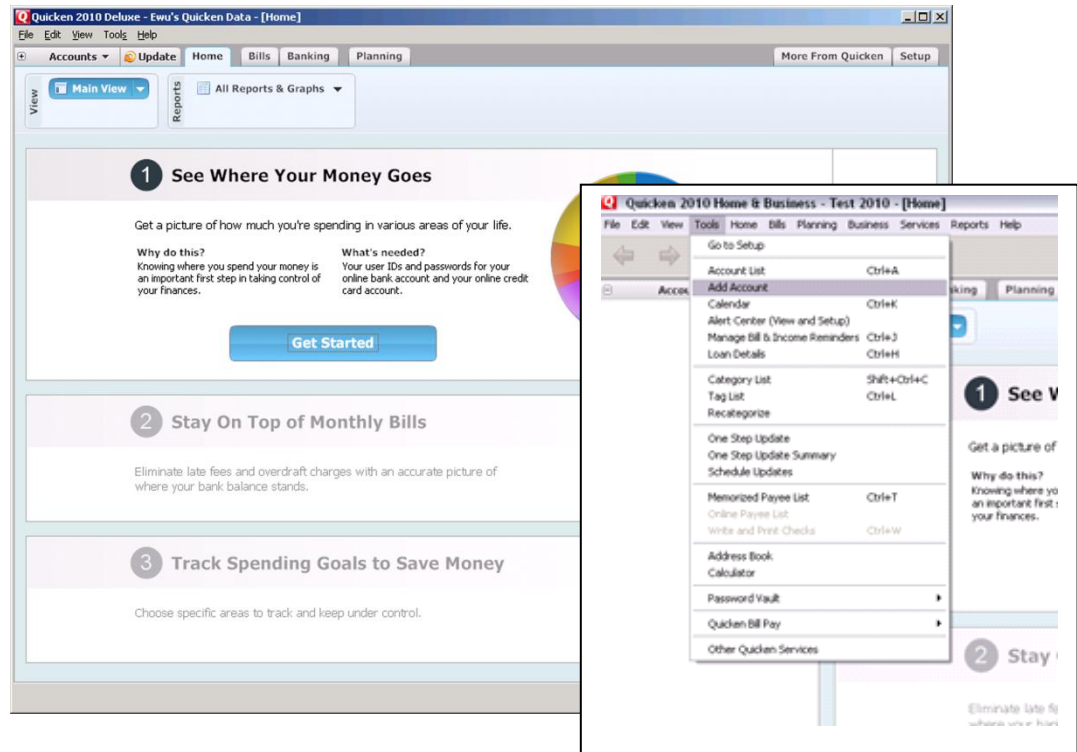
- **Direct Connect** provides a direct connection to your financial institution, and allows you to download transactions, as well as initiate transfers and bill payments directly from Quicken, without having to log into your bank website. Not all financial institutions support Direct Connect. Some financial institutions may charge an additional fee for this service. If you are interested in Direct Connect, please contact your financial institution to activate it before you set up your account in Quicken. Once you receive your Direct Connect login information, enter it in this screen.
- **Express Web Connect** allows you to download transactions automatically from your bank, but does not enable transfers or bill payments. Your login is the same as what you use to login on your bank website.



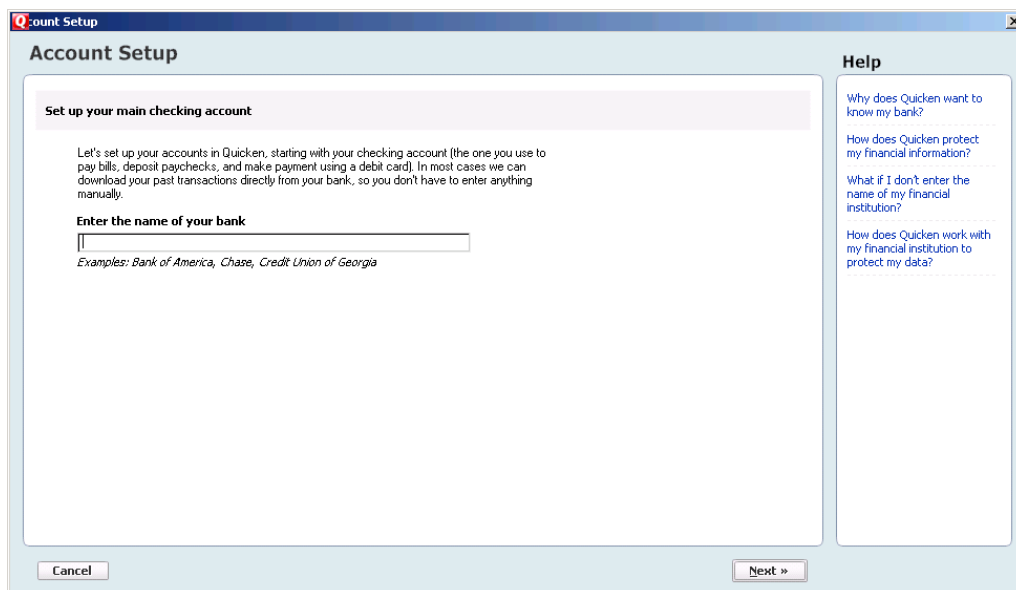
Quicken automatically tries to pick the best method to connect to your financial institution. When you enter a login on this screen, Quicken will try Direct Connect, and if that doesn't work, will default to Express Web Connect. If that doesn't work, you will be taken to the login page of your financial institution's website.

CREATING A NEW QUICKEN ACCOUNT 2010

1. To add a new account Launch Quicken 2010 → Click on the Tools drop down menu → then select the Add Account option.



2. On the Account Setup screen enter the name of your financial institution → then click the Next button.



3. Enter your customer ID and password (this is usually the same information that you use to login to your financial institution's web site, however it may differ) → Click Next to continue.

Account Setup

Connect to

Log in to
Enter the same information you use to sign in to the web site for

User ID / User Name
password
Reenter password

Protecting your financial information is critical to us. We use the highest levels of security to protect this information. [Learn more.](#)

I don't want to download transactions from
If you choose this option, you'll be able to finish setting up your account in Quicken, but you'll have to enter all transactions manually.

Help

What login information should I use?
What is Direct Connect?
How can I find my routing or account number?
How does Quicken work with my financial institution to protect my data?
Did you get special Direct Connect instructions from your bank?

If you are unsure about which ID and password to use, you may want to contact your financial institution.

Cancel « Back Next »

4. All downloadable Quicken accounts display. You can customize the Account Name (to use in Quicken: Enter account nickname) for each account by typing directly in the field.

Account Setup

Add Your Accounts

We found the following accounts for you at
The checked accounts will be added to Quicken.
We also recommend entering an account nickname, which will be displayed in Quicken.

Select	Account	Type	Account nickname
<input checked="" type="checkbox"/>	CHECKING XXX-XXX	Checking	CHECKING XXX-XXX

Help

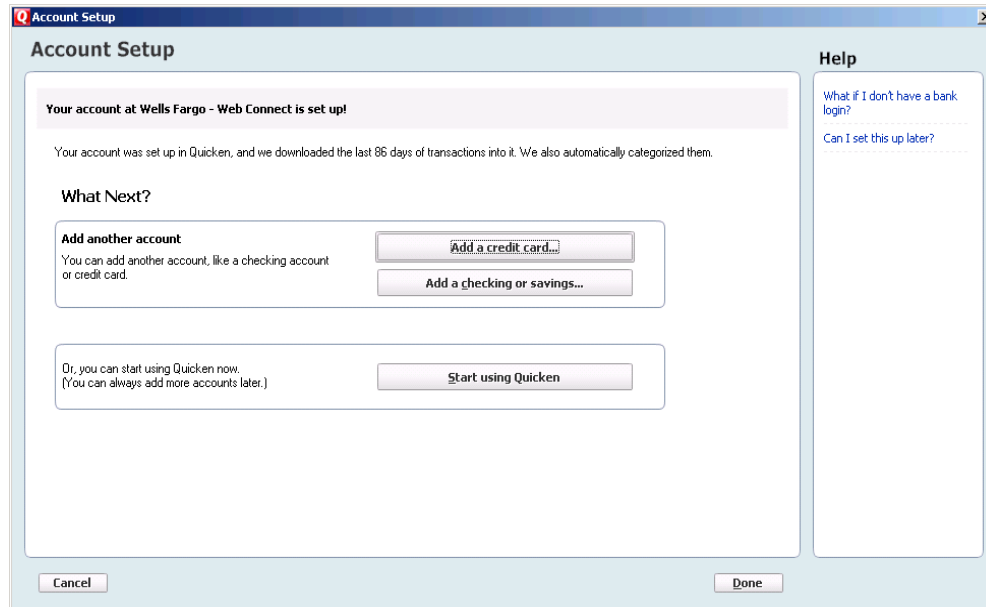
I don't see the account I want to add

To customize the Account Name in Quicken, enter account nickname

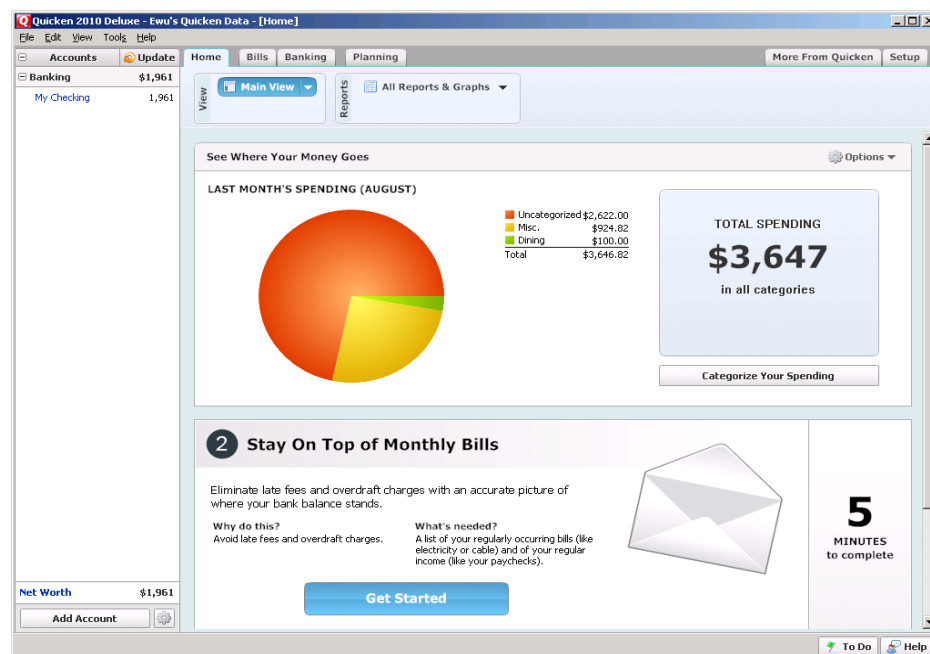
Cancel Next »

5. Confirm the accounts you wish to set up and/or customize Account Name → click Next

6. Quicken will download your transactions and automatically categorize them, so you can quickly see where your money is going. You can choose to add another account right now or start using Quicken and add more accounts later.



7. The pie chart on the homepage shows you where your money is going. To review your transactions, click on the account name in blue on the left side of the screen. To add another account, select the "Add Account" button on the bottom left of the screen. To update your accounts, just select the "Update" button at the top left of the screen to download transactions from your bank again.



CREATING A NEW QUICKEN ACCOUNT 2009

1. Go to Online drop down Menu → Online Account Services Setup → Create New Quicken Account.
2. **Quicken Windows 2009 version only:** Select the account type you are creating → Click Next

For Money market accounts select either Checking.

3. 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.
4. After you have selected yes to connect to the appropriate through Quicken, click Next.
5. Enter your customer ID and password (your password will need to be entered in a second time for confirmation) Click Next to continue.

Account Setup

Enter your Password for _Server Jay FIAT Test

Financial Institution _Server Jay FIAT Test
User ID DEMOBK

_Server Jay FIAT Test password
Reenter password

Your password and data are secure. Find out how Quicken protects you.

_Server Jay FIAT Test requires that you enter the account number in order for Quicken to find your account

Account Number

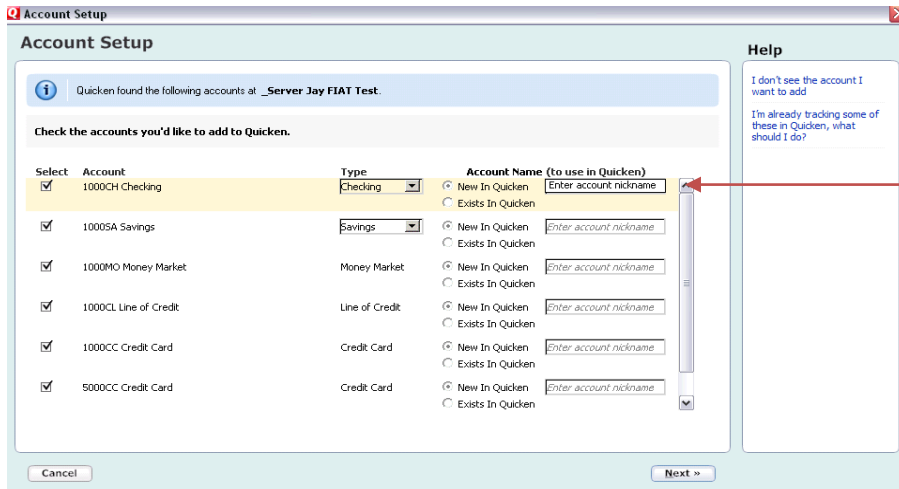
Cancel < Back Next >

Help

Which password should I enter?
Why can't I change my User ID?
Is my password secure?
How does Quicken work with my financial institution to protect my data?

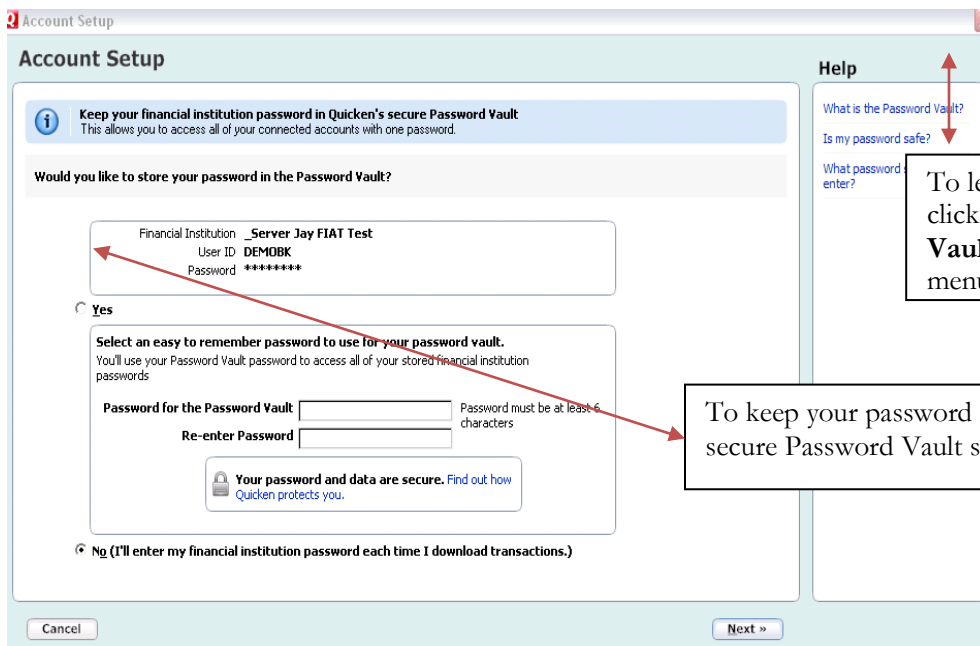
If you are unsure about which ID and password to use, then see the **Need a Customer ID and password** information to the right.

- All downloadable Quicken accounts display. You can customize the Account Name (to use in Quicken: Enter account nickname) for each account by typing directly in the field.



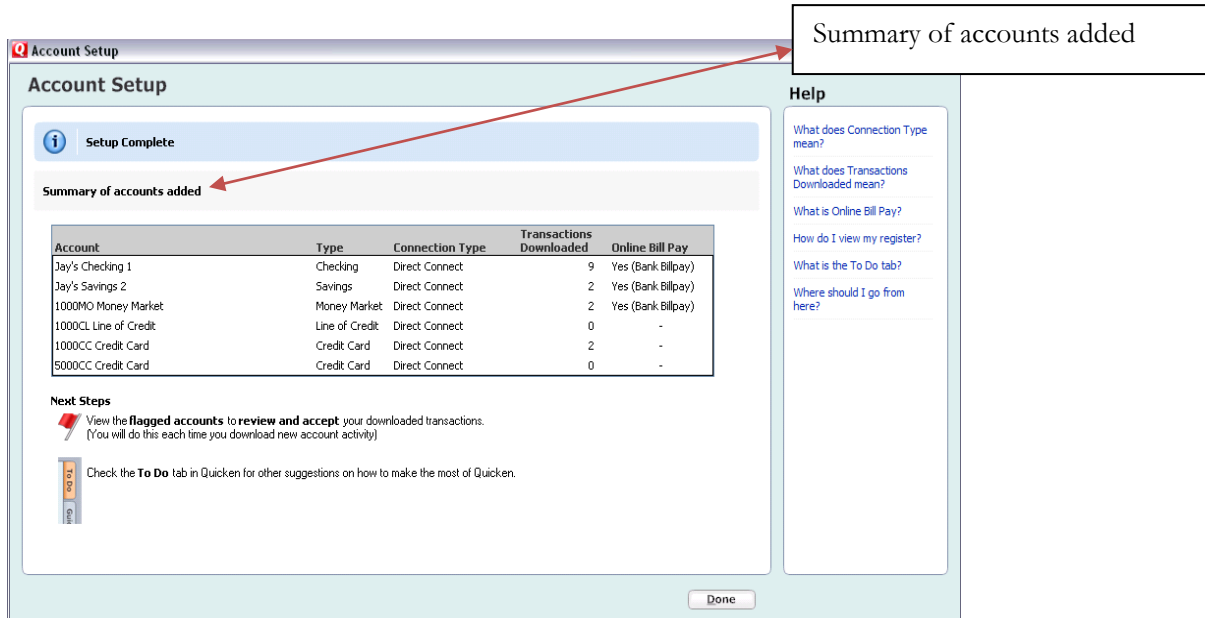
To customize the Account Name in Quicken, enter account nickname

- Confirm the accounts you wish to set up and/or customize Account Name → click Next
- After the Quicken One Step update is completed, you will be prompted to store your password in the Password Vault. Select YES or NO to continue, → Click Next



To learn on the Password Vault, click on What is the Password Vault under the Help menu

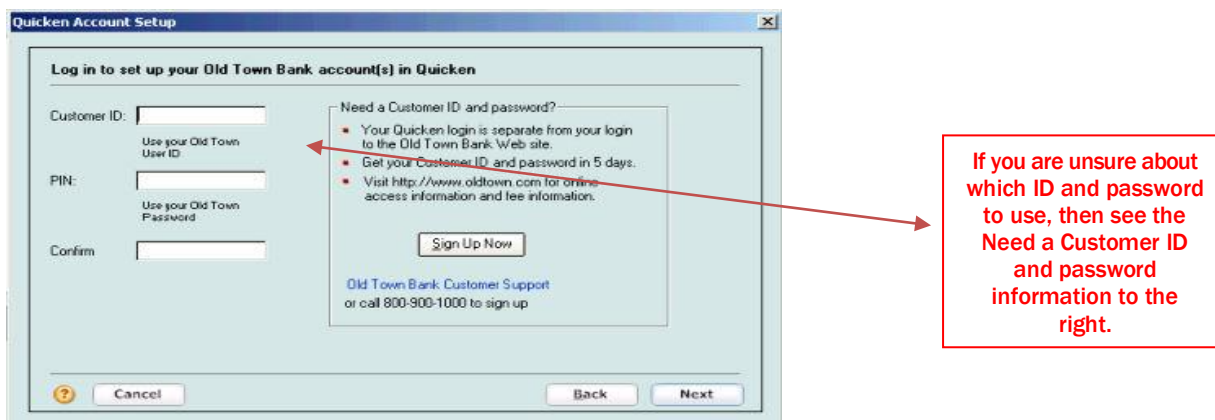
To keep your password in Quicken's secure Password Vault select yes.



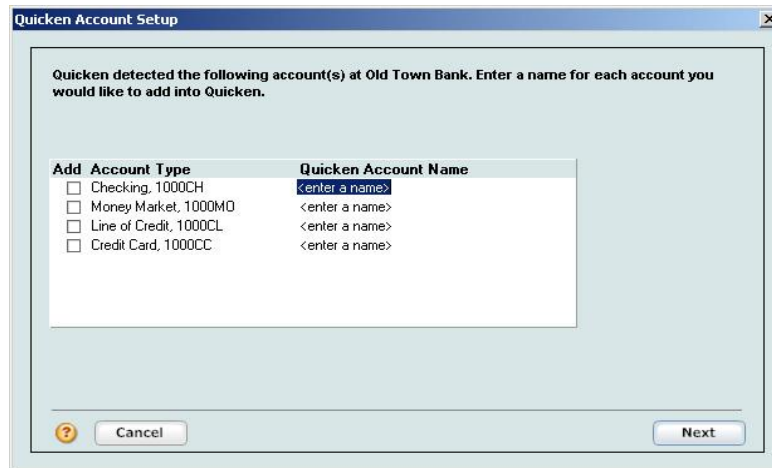
9. After reviewing your Account Setup Summary page, Click Done

CREATING A NEW QUICKEN BANKING ACCOUNT 2008

1. Choose Cash Flow menu → Cash Flow Accounts → Add Account.
2. In the This account is held at the following institution: field, enter 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 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.



6. All downloadable Quicken accounts display. 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.

YOU ARE SET UP AND READY TO USE QUICKEN