Getting Started with <u>Transaction</u> Download for Quicken 2006 for Mac – Web Connect

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

Citizens Bank®

This guide includes the following sections:

Set up a Quicken Account and Download Transactions for the First Time, page 2— Explains how to create a new Quicken account and download transactions.

Keeping your Quicken Accounts Up-to-Date, page 3—Explains how to download transactions on an ongoing basis.

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 the following information:

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.
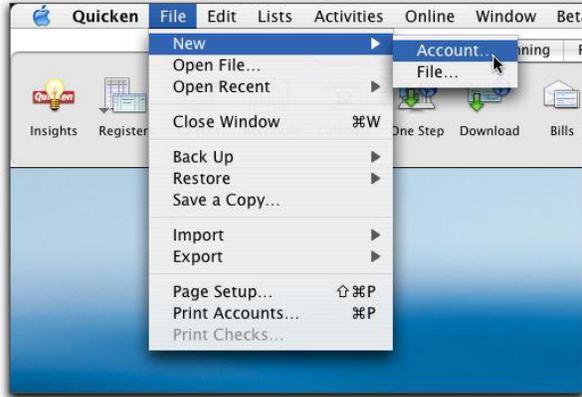
This guide will show you how to setup and download your accounts. For step-by-step help, choose Quicken Help from the Help menu.

Important: First, get the latest program updates!

From the **Quicken 2006** menu, select **Check for Updates** and follow the on-screen instructions.

**Step 1**   From the File menu, select New Account.

Step 2   In the window that appears start typing Citizens Bank-New England Consumer for personal accounts or Citizens Bank-New England business for business accounts. 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. Once the financial institution is selected in the list click Continue.

Step 3   In the next window click Continue to accept the Online option.

Step 4   Enter your Customer ID and PIN in the next window. Quicken goes online to retrieve your account information.

Step 5   Click on Select an account to specify a Quicken account name or use an existing Quicken register if you are presently manually entering transactions. Click Continue when you have specified how Quicken should handle each online account.
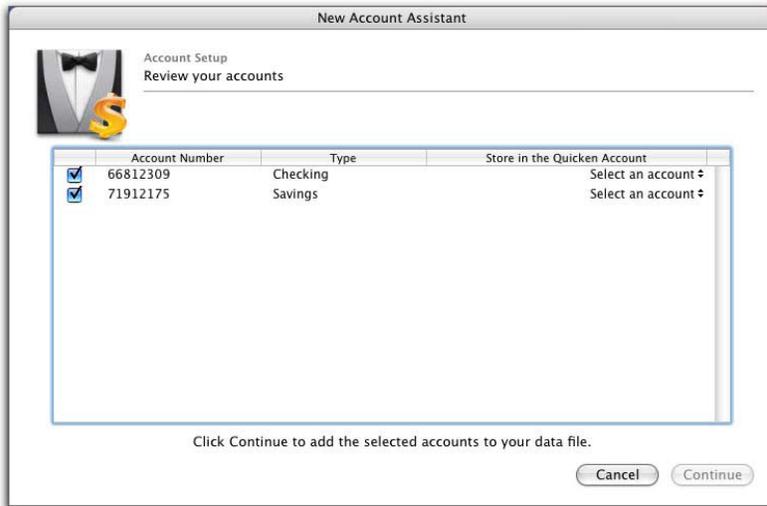

Step 6   Click Continue to create all the account registers and download transactions into Quicken. Congratulations! For instructions on downloading account information on an on-going basis, see the "Keeping Your Quicken Accounts Up-to-Date" section.

Keeping Your Quicken Accounts Up-to-Date

Step 1   From the **Online** menu, select **Download Transactions**.

Step 2   Choose Citizens Bank from the Financial Institution pop-up menu.

Step 3   Choose the account name from the Account pop-up menu.

Step 4   Click **Download**.

Step 5   Enter your PIN Vault password or click Bypass PIN Vault and enter the PIN assigned to you by Citizens Bank for use with Quicken.

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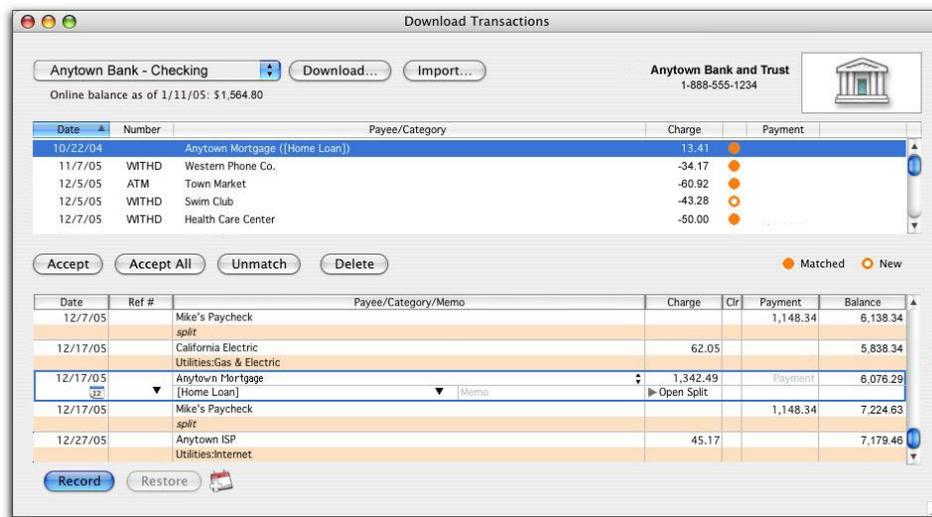
Working with your downloaded transactions

Step 1   Select each transaction that you want to add to your register. You can hold down the Command key and click additional transactions to select multiple transactions. If you make a mistake and want to deselect a transaction, click it again.

Step 2   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.