



The First National Bank of Long Island

Where Everyone Knows Your Name®

Member FDIC

GETTING STARTED WITH QUICKEN® 2012 - 2010, 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. Your ID and password are the ones that you use to login to FirstLink Online Banking.

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.

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, or click on the *Tools* drop down menu and select → *One Step Update*.
2. Uncheck all boxes and click → *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. Then 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 ACCOUNT (Click on the product version you are looking for)

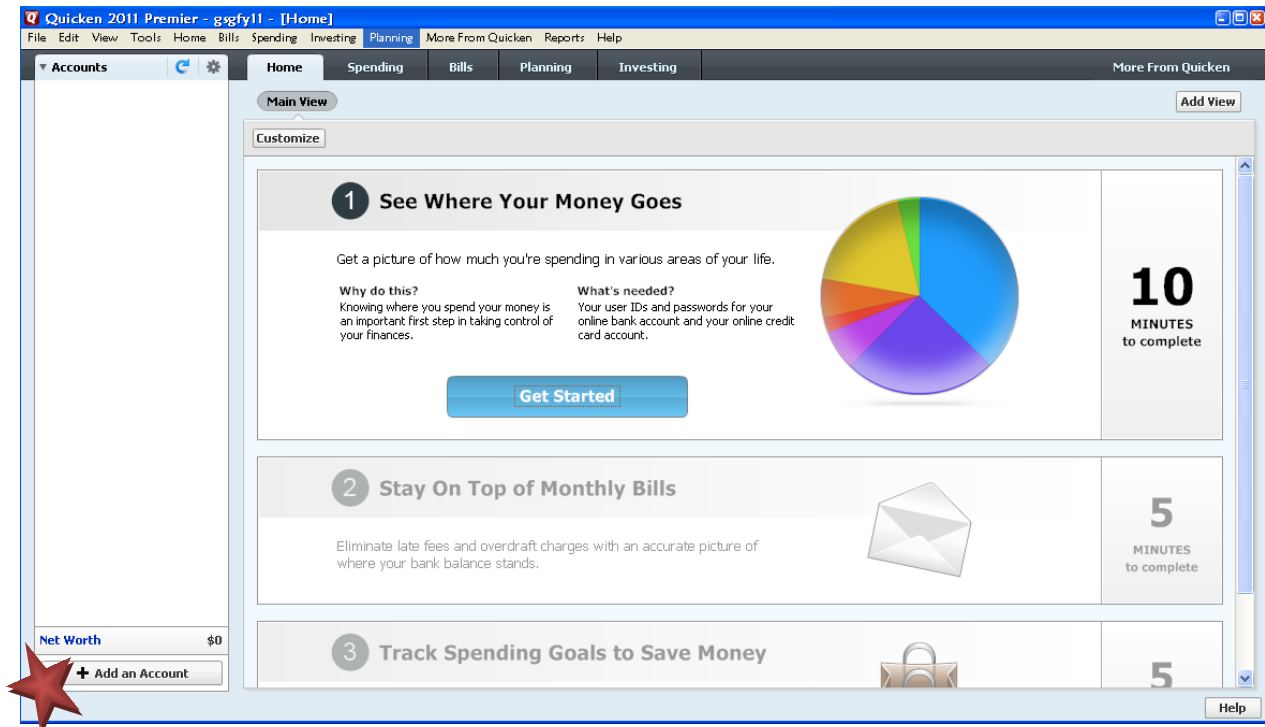
2012- [CREATING A NEW QUICKEN ACCOUNT 2012](#)

2011 - [CREATING A NEW QUICKEN ACCOUNT 2011](#)

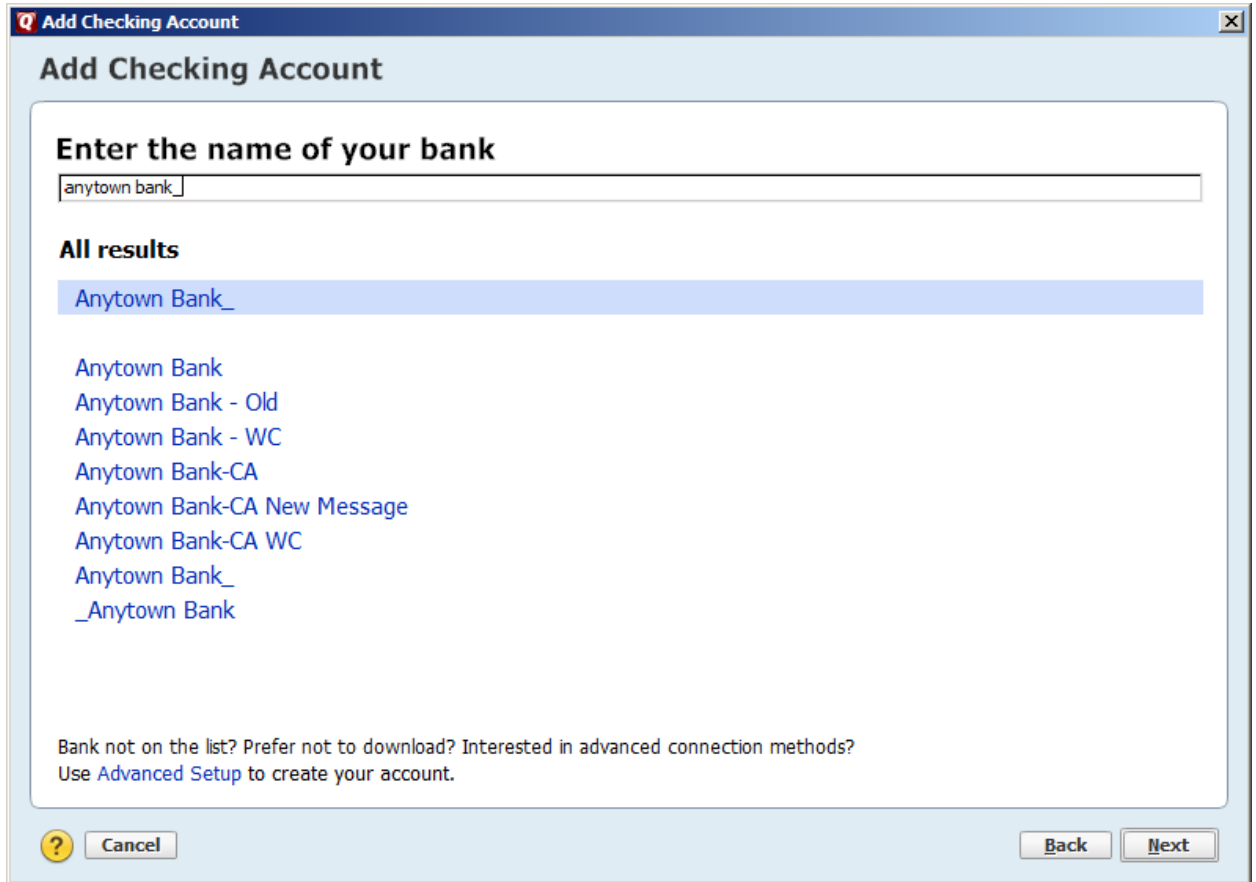
2010 - [CREATING A NEW QUICKEN ACCOUNT 2010](#)

CREATING A NEW QUICKEN ACCOUNT 2012

1. To add a new account, launch Quicken 2012, click the *Tools* drop down menu and select → *Add Account* or click the *Add an Account* button



2. On the Add Account window select the type of account you will be setting up. In the window that opens, select → the name of your financial institution and then click the *Next* button.



The screenshot shows a window titled "Add Checking Account" with a search bar containing "anytown bank_". Below the search bar, a list of search results is displayed, with "Anytown Bank_" highlighted. The list includes "Anytown Bank", "Anytown Bank - Old", "Anytown Bank - WC", "Anytown Bank-CA", "Anytown Bank-CA New Message", "Anytown Bank-CA WC", "Anytown Bank_", and "_Anytown Bank". At the bottom of the window, there are buttons for "Cancel", "Back", and "Next", along with a help icon (question mark) and a text prompt: "Bank not on the list? Prefer not to download? Interested in advanced connection methods? Use [Advanced Setup](#) to create your account."

Add Checking Account

Enter the name of your bank

anytown bank_

All results

- Anytown Bank_ (highlighted)
- Anytown Bank
- Anytown Bank - Old
- Anytown Bank - WC
- Anytown Bank-CA
- Anytown Bank-CA New Message
- Anytown Bank-CA WC
- Anytown Bank_
- _Anytown Bank

Bank not on the list? Prefer not to download? Interested in advanced connection methods?
Use [Advanced Setup](#) to create your account.

? Cancel Back Next

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 *Connect* to continue.

Add Checking Account

Anytown Bank_
WEB: www.intuit.com | TEL: 800-900-1000

Anytown Bank_ User ID / User Name
for your Anytown Bank_ account
rberduck

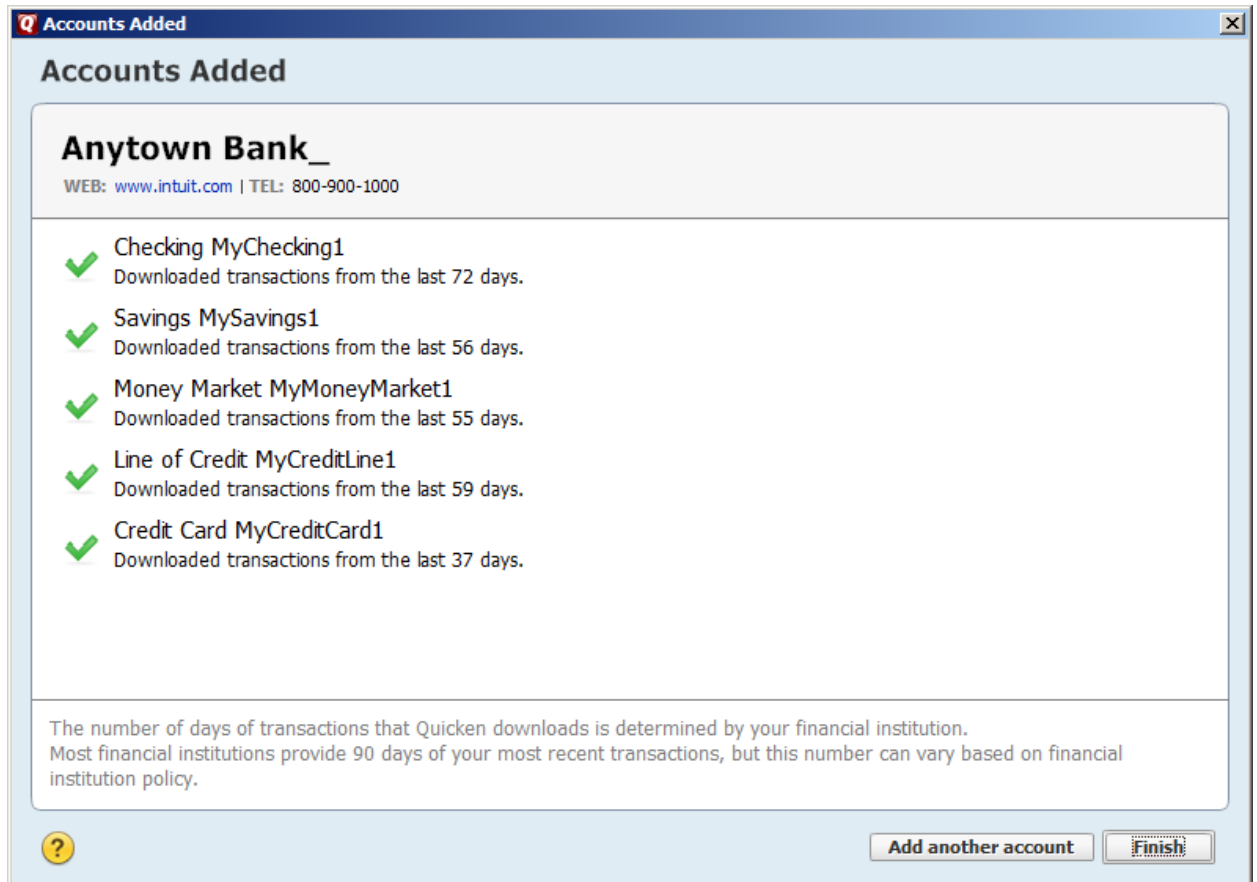
Anytown Bank_ password
for your Anytown Bank_ account

Save this password

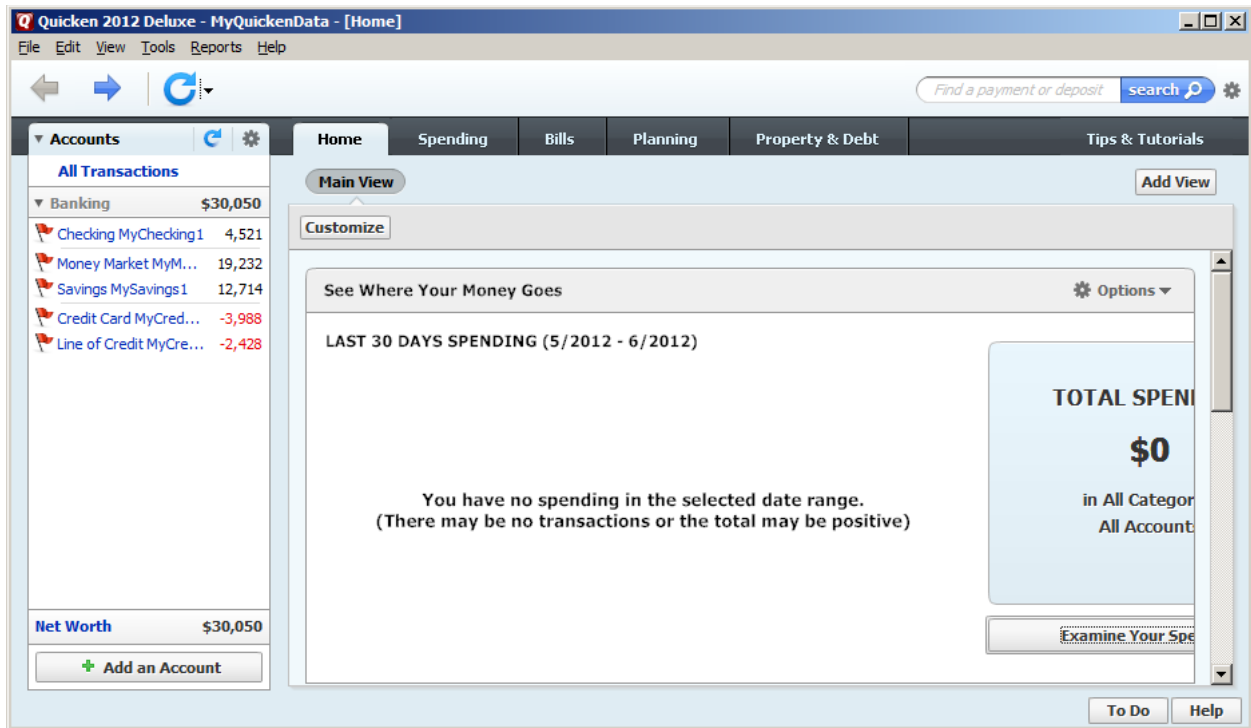
Your credentials are safe with Quicken
We use bank-level encryption to secure your login credentials, they cannot be compromised
[Learn more about our security](#)

? For more options use [Advanced Setup](#)

4. All downloadable Quicken accounts display and are enabled. You can *Add another account* with a different User ID, or click *Finish*.



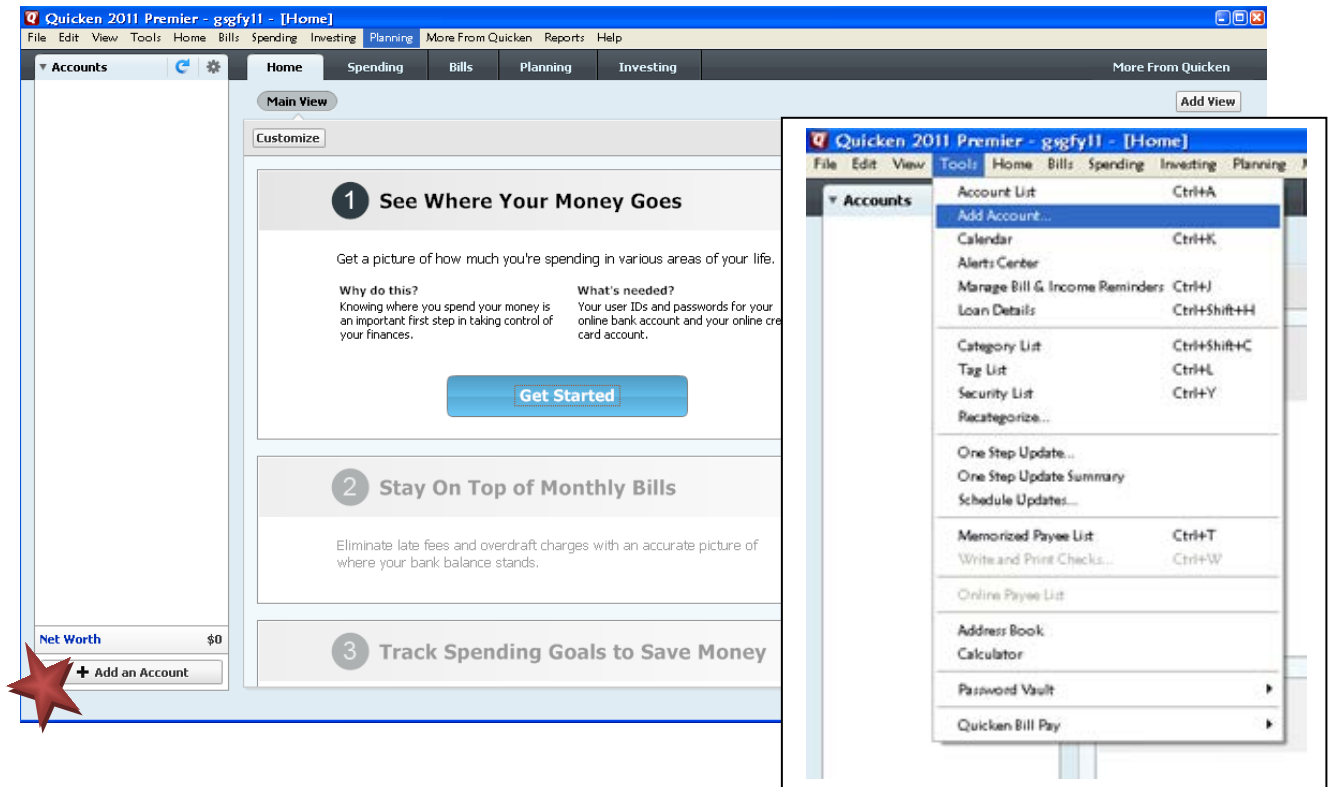
5. To review your transactions, click on the account name in blue on the left side of the screen. For each transaction enter *Accept*, or *Accept All* if all transactions are acceptable. Quicken will categorize your transactions so you can quickly see where your money is going.



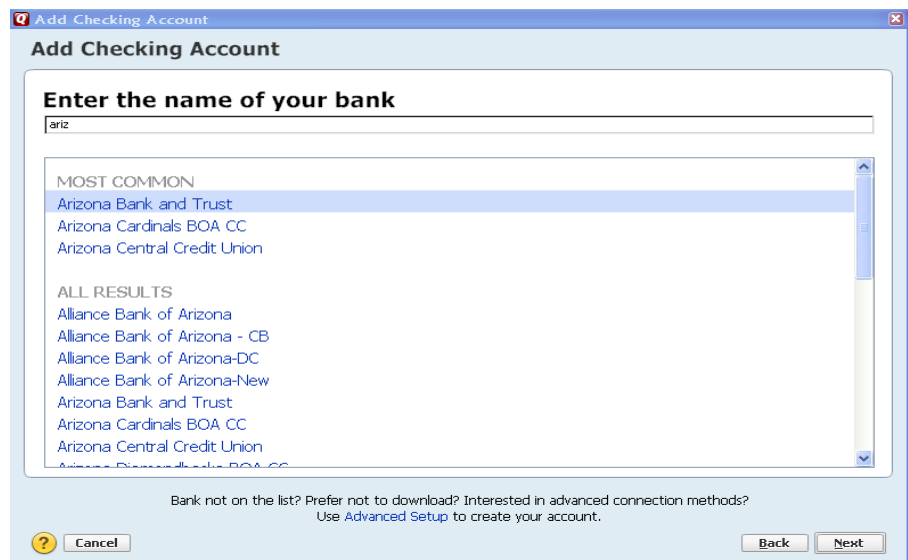
6. Quicken will download your transactions and automatically categorize them. The pie chart on the homepage shows you where your money is going. To update your accounts, just select the "Update" button (blue circular arrow) at the top left of the screen.

CREATING A NEW QUICKEN ACCOUNT 2011

1. To add a new account Launch Quicken 2011, select the *Tools* drop down menu and select → *Add Account*, or Click the *Add an Account* button



2. On the Add Account window select the type of account you will be setting up → Click Next. 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.

Add Checking Account

Arizona State CU
WEB: www.azstcu.org | TEL: 1-800-671-1098

User ID
For your online Arizona State CU account

Password
For your online Arizona State CU account

Save this password

Your credentials are safe with Quicken
We use bank-level encryption to secure your login credentials, they cannot be compromised
We use a read-only connection to your bank. We cannot move or transfer money
[Learn more about our security](#)

? Cancel

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

4. All downloadable Quicken accounts display. You can choose to add another account right now or start using Quicken and add more accounts later.

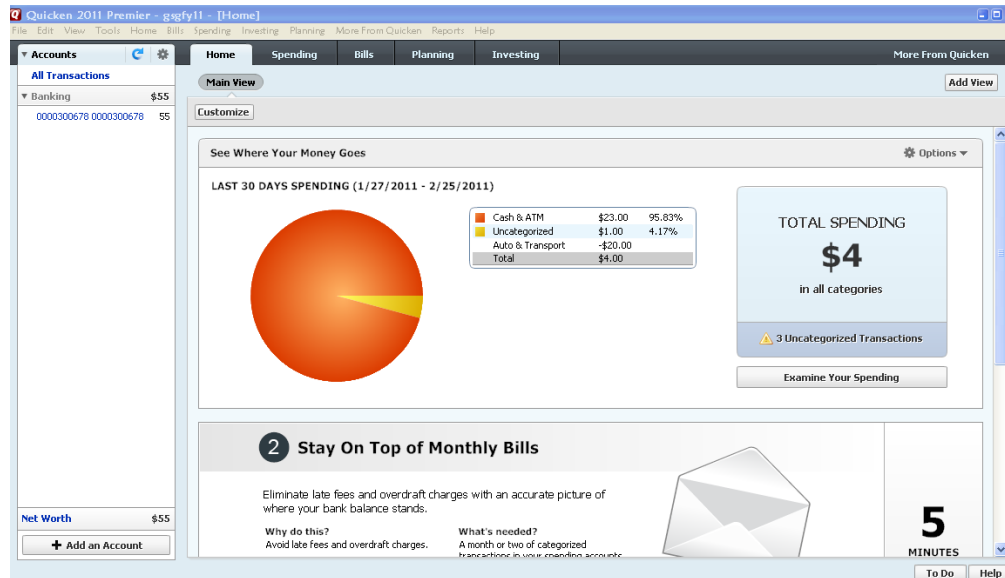
Account Added

FirstMerit Bank N.A.
WEB: www.firstmerit.com | TEL: 1-888-554-4362

✓ 0000300678 0000300678
Downloaded and categorized 81 days of transactions.

? Add another account Finish

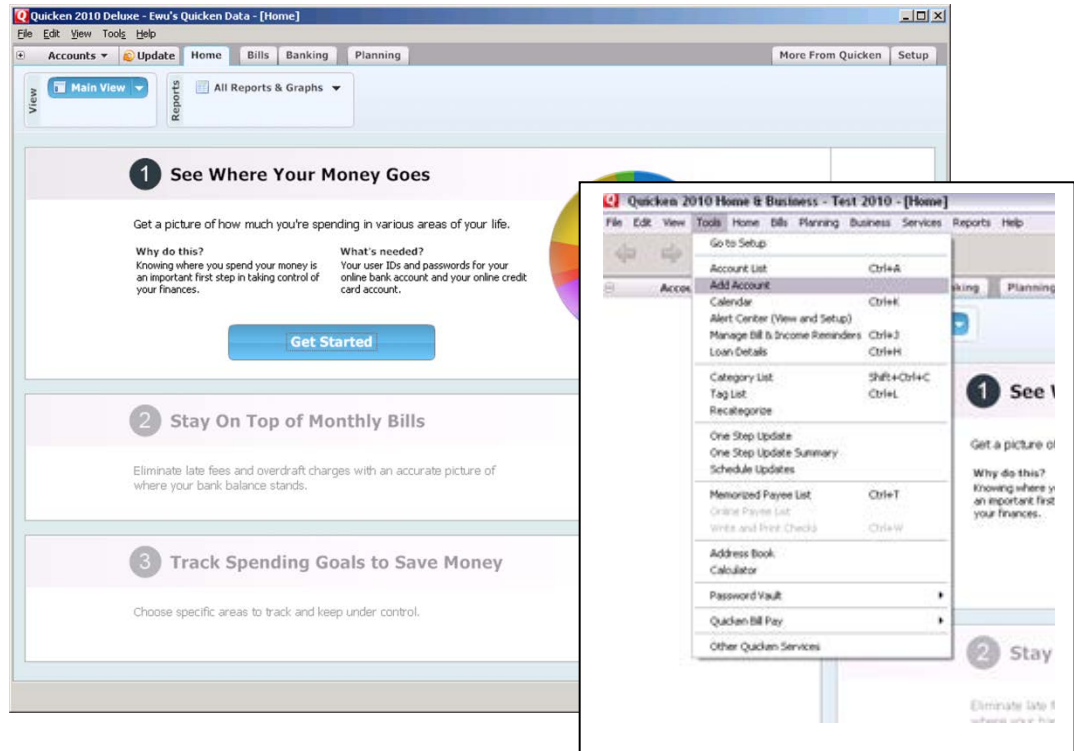
5. Quicken will download your transactions and automatically categorize them, so you can quickly see where your money is going.



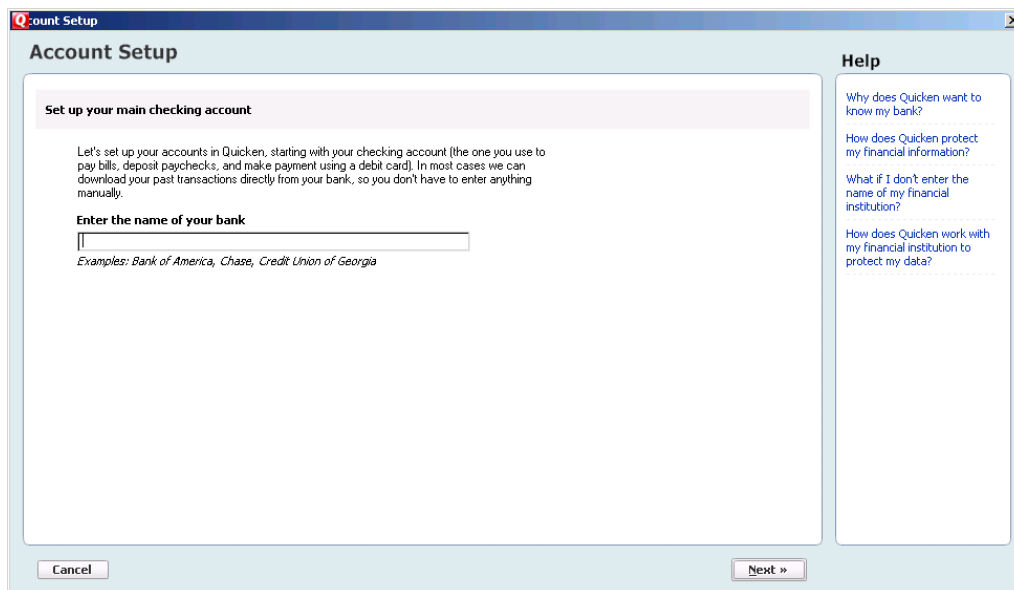
7. The pie chart on the homepage shows you where your money is going. To review your transactions, click on the account name in blue on the left side of the screen. To add another account, select the *Add an Account* button on the bottom left of the screen. Quicken will download your transactions and automatically categorize them. The pie chart on the homepage shows you where your money is going. To update your accounts, just select the “Update” button (blue circular arrow) at the top left of the screen.

CREATING A NEW QUICKEN ACCOUNT 2010

1. To add a new account Launch Quicken 2010, click on the *Tools* menu and select → *Add Account*



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



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?

Cancel << Back Next >>

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

4. All downloadable Quicken accounts display. You can customize the Account Name, enter an *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

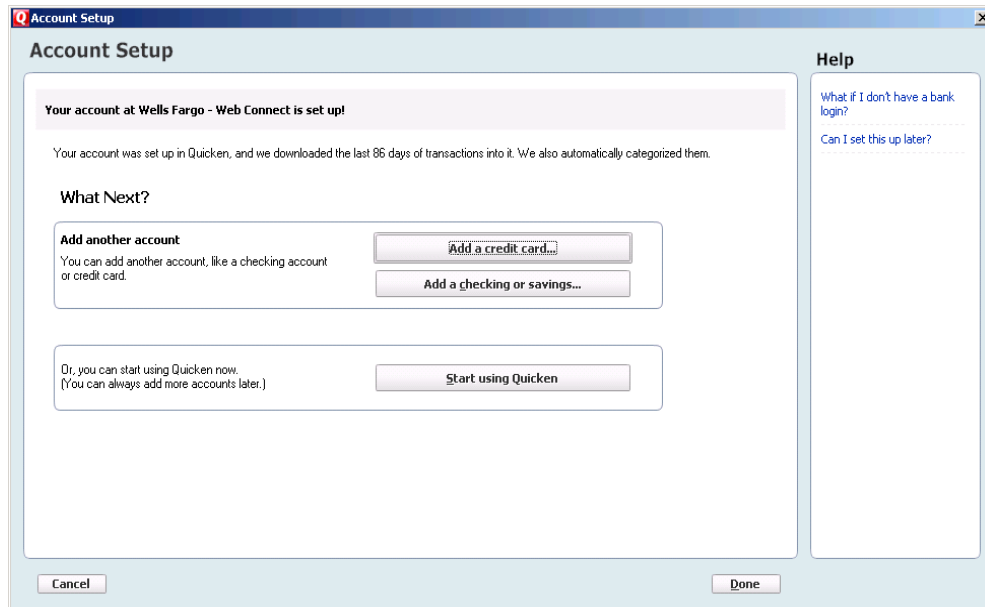
I don't see the account I want to add

Cancel Next >>

To customize the Account Name in Quicken, enter account nickname

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.

