

GETTING STARTED WITH QUICKEN®

2014 Windows®

Direct Connect also adding BillPay

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



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



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

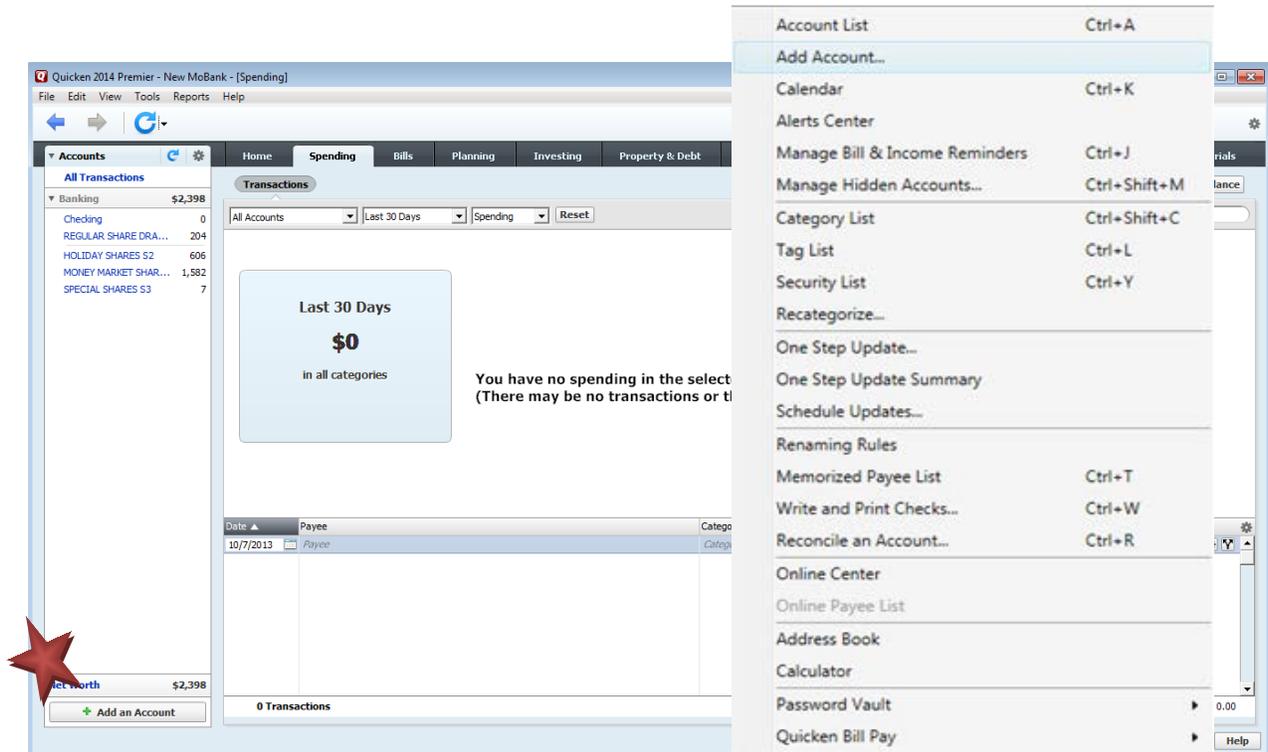
- **Direct Connect** provides a direct connection to your financial institution, and allows you to download transactions, as well as initiate transfers and bill payments directly from Quicken, without having to log into your bank website. Not all financial institutions support Direct Connect. Some financial 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.



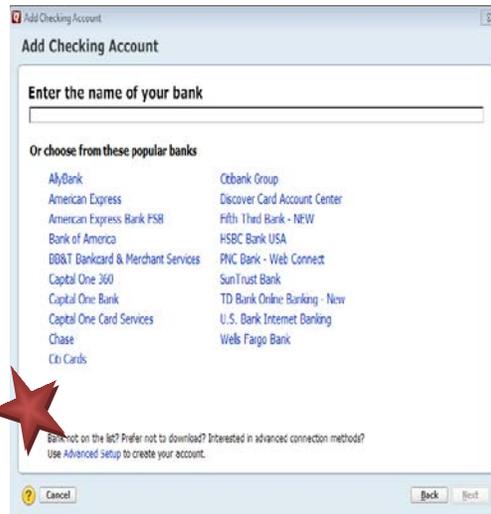
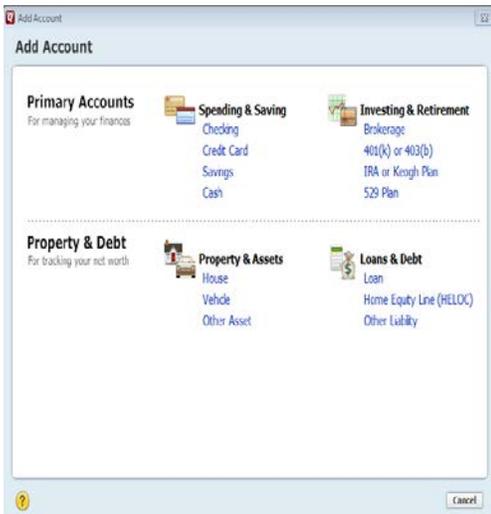
Quicken automatically tries to pick the best method to connect to your financial institution. When you enter a login on this screen, Quicken will try Direct Connect, and if that doesn't work, will default to Express Web Connect. If that doesn't work, you will be taken to the login page of your financial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

CREATING A NEW QUICKEN ACCOUNT 2014

1. To add a new account → Click on the Tools drop down menu → then select the Add Account option or Click the Add an Account button

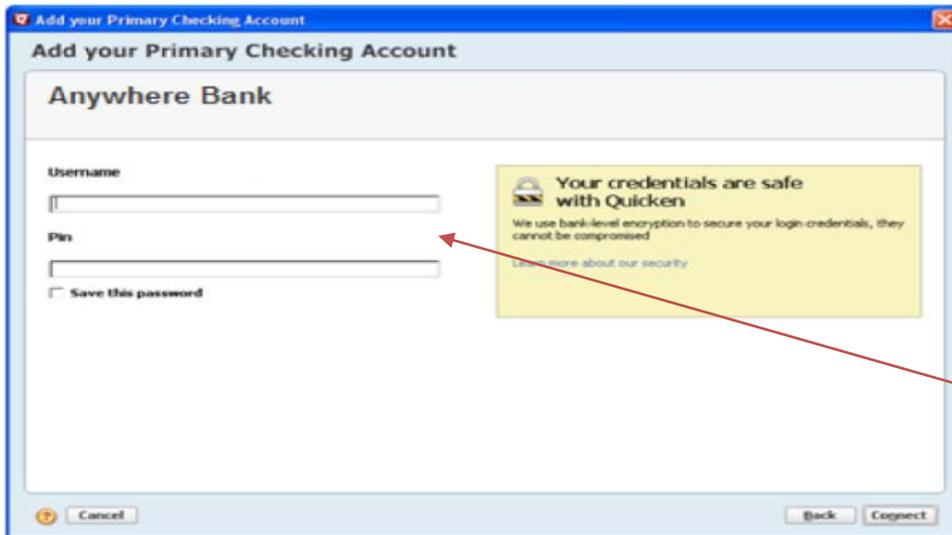


2. On the Add Account window select the type of account you will be setting up → Click Next. Enter the name of your financial institution → then click the Next button.



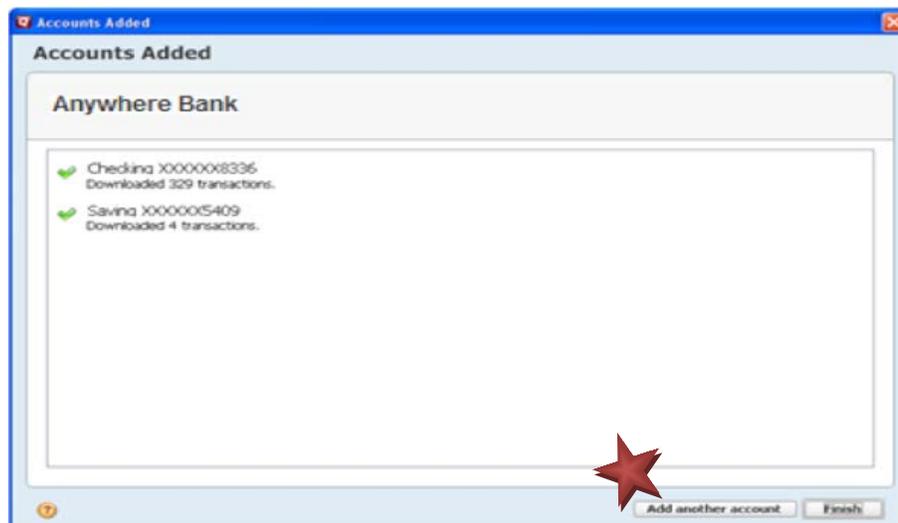
By selecting Advanced Setup you will be able to select the option to download transaction directly from your financial institution's website

3. Enter your bank login information; this will be the same UserID/Password as your financial institution's website. Click Connect



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.



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

ADDING ONLINE BILL PAY

Sending online payments with Quicken is a fast and easy way to pay your bills. Just add the payment to the Online Payee List once; all Quicken accounts share this list.

Adding Online Bill Payment

1. Select the Tools menu drop down → Online Center.
2. Choose your financial institution from the drop-down list.
3. Select the Payments tab → type your payee's name in the Payee field → press the TAB key.
4. In the Set Up Online Payee window, enter your payee's contact and account information. Click OK.
5. Review the information on the Confirm Online Payee Information screen → click Accept to continue (if you need to edit the information, click Cancel and make the necessary changes).



An online payee can be any business, organization, or individual to whom you make payments.

Creating an Online Payment

After you create your online payee, you will return to the Payments tab of the Online Center. Your newly created payee displays automatically. You now are ready to complete an online payment

1. Fill in the remaining fields for the payment that you wish to make (payment amount, processing or delivery date, category, and memo). Click Enter.



Note: If The First National Bank of Long Island supports processing dates, funds are withdrawn from your account on the date that your payment is processed. It may take a couple of extra days for your payee to receive this payment, so you should build these days into your payment date.



Note: If The First National Bank of Long Island supports delivery dates, funds are withdrawn on the date that you schedule your payee to receive payment.

2. Click Update/Send

To set up automatic payments, click on Repeating

Your password is needed when making an online payment

YOU ARE SET UP AND READY TO USE QUICKEN