

## Getting Started with Quicken® Essentials for Mac®

Before you can download your transactions with Quicken Essentials, you must have Internet access, your Customer ID, and PIN. Your ID and PIN are the same ones that you use to login to FirstLink Online Banking.

For step-by-step help with an online task, choose the **Help** menu **Quicken Essentials Help/Basics/**

This guide includes the following sections:

- [Downloading the Latest Quicken Update](#)
- [Creating a New Account and Downloading via Direct Connect](#)
- [Creating a New Account and Downloading via Web Connect](#)
- [Keeping your Quicken Accounts up to Date](#)
- [For Additional Help](#)

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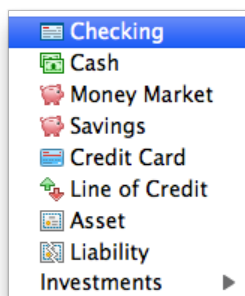
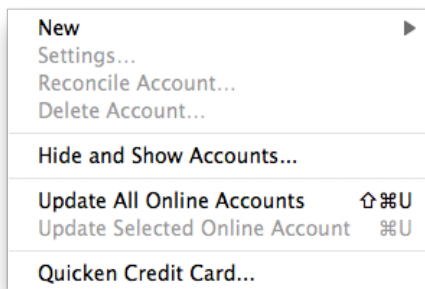
### DOWNLOADING THE LATEST QUICKEN UPDATE

1. From the **Quicken** menu choose **Check for Updates**.
2. Follow the on-screen instructions.

## CREATING A NEW ACCOUNT AND DOWNLOADING VIA DIRECT CONNECT

Please see related screen shots below the steps:


1. From the **Quicken** menu choose **Account/New** (from the submenu choose the account type such as Checking, Savings, or other)
2. In the *Add Account* window that appears, start typing The First National Bank of Long Island. Select the The First National Bank of Long Island in the list, and click **Options**
3. Select the *Direct Connect* Radio Button and Click **Continue**.
4. Log into your Intuit Account first; enter your **Member ID** and **Password**, and click **Continue**. Then enter your **Customer ID** and **Password** for online access at your Financial Institution.
5. Uncheck any account that you do not want to set up.
6. Click **Continue** when you have specified how Quicken should handle each online account.
7. Click **OK** to view the account registers.



### Add Checking Account

Select your bank. Use the search field or select from the list below.

- nuVision Financial FCU
- Patriot National Bank
- \_2009 Disc. Test
- \_1st Commonwealth Bank and Trust
- \_All Services Bank
- \_Anytown Bank**
- \_Intuit OFX Server 1 - All SVCS
- \_Intuit OFX Server 1 - Banking
- \_Intuit OFX Server 2 - All SVCS
- \_Intuit OFX Server 2 - BANK wMFA
- \_Intuit OFX Server 2 - INV
- \_Server Jay FIAT Test
- \_Server Jay JHCU
- \_Server Jay QB Test
- \_Server
- \_Server\_Jay\_FL\_3
- \_Server\_Jay\_FL\_4



**\_Anytown Bank**

Phone: 800-900-1111  
<http://www.intuit.com>

My bank is not in the list

### Add Checking Account

#### How Should Quicken Connect?

Choose the type of connection Quicken should use to connect to \_Anytown Bank.

**Quicken Connect**  
 This is the standard way of connecting from Quicken Essentials to your bank.

**Direct Connect**  
 Some banks offer a special service called Direct Connect, which sometimes includes additional features. Use this service if you expressly signed up for Direct Connect with your bank, and your bank sent you a special login PIN or password.

**Web Connect**  
 If your bank doesn't support Quicken Connect or Direct Connect, you can download your transactions into Quicken Essentials using Web Connect, a two-step process:  
 1. You will go to your bank's web site and download a file containing your transactions onto your computer.  
 2. Then you'll import that file into Quicken Essentials.

**Manual**  
 If your bank doesn't support Quicken Connect, Direct Connect, or Web Connect, you can still create an account in Quicken but you will have to manually enter your transactions or other financial information.

### Add Checking Account


#### Enter Login Information for \_Anytown Bank

This will allow you to connect directly to your bank and download activity.

Customer ID:

Password/PIN:

Add Password to Keychain

 Protecting your financial information is absolutely critical to us. Learn more about security.

### Add Checking Account

#### 7 Accounts Found

Add or link the accounts you would like added to Quicken.

Account Name & Description	Type	Action	Quicken Account Name
Checking 654321	<input type="button" value="Checking"/>	<input type="button" value="Add"/>	PERSONAL CHECKING
Savings 303030	<input type="button" value="Savings"/>	<input type="button" value="Ignore"/>	
Money Market Greg123MM	<input type="button" value="Money Market"/>	<input type="button" value="Ignore"/>	
Line of Credit Greg123CL	<input type="button" value="Line of Credit"/>	<input type="button" value="Ignore"/>	
Credit Card 3000CC	<input type="button" value="Credit Card"/>	<input type="button" value="Ignore"/>	
Credit Card 3001CC	<input type="button" value="Credit Card"/>	<input type="button" value="Ignore"/>	

## CREATING A NEW ACCOUNT AND DOWNLOADING VIA WEB CONNECT

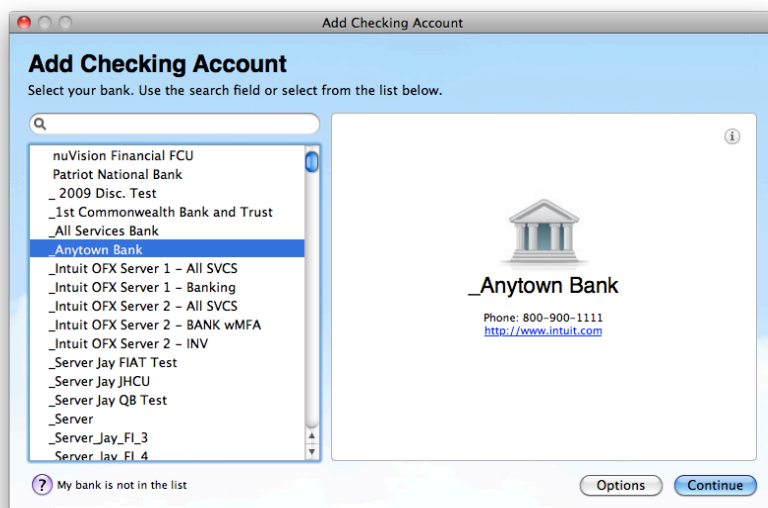
*Please see related screen shots below the steps:*

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

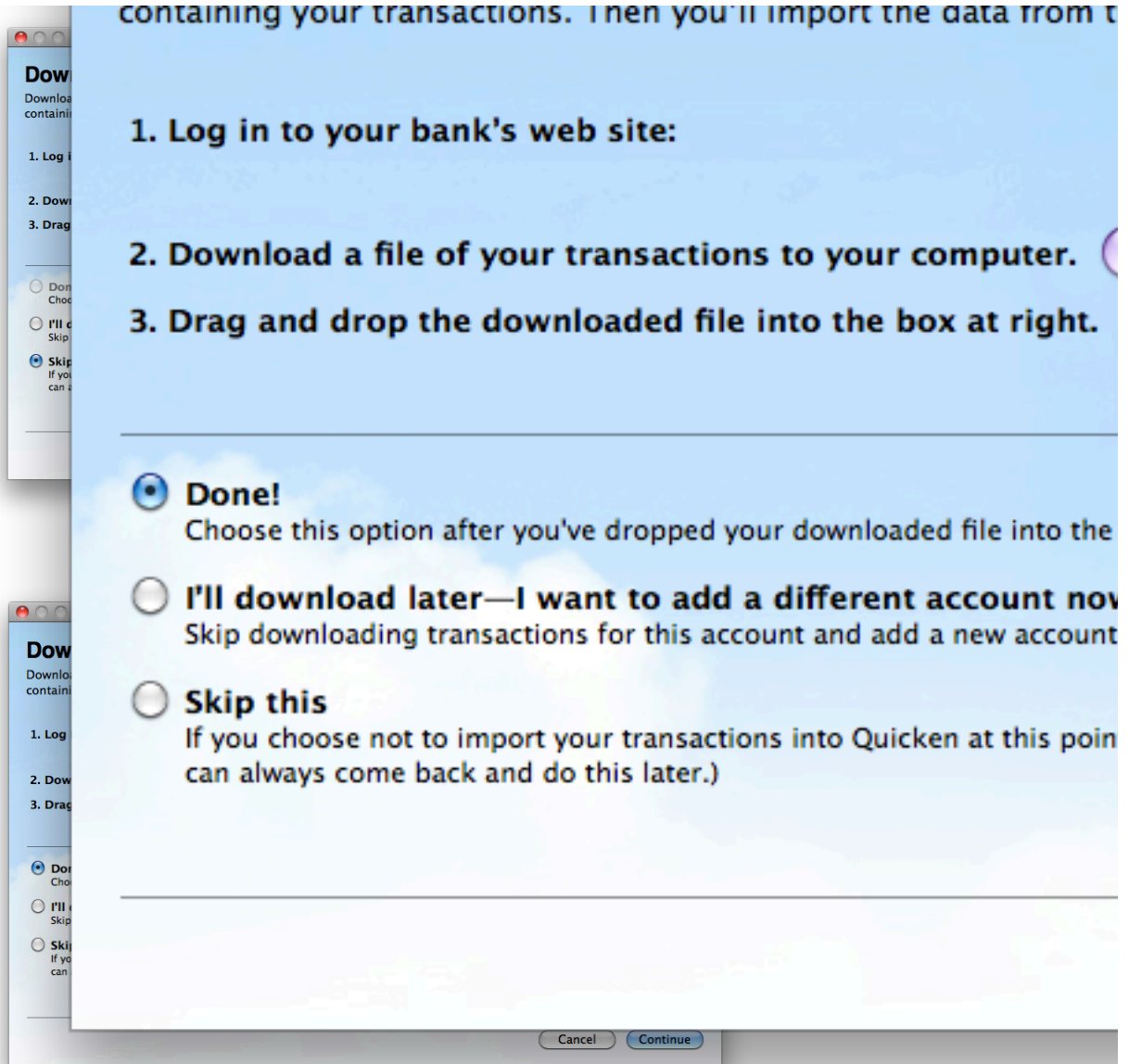
Next step: login to your financial institution online banking web site and follow the steps to download transactions into Quicken.

Save the downloaded Web Connect file (With extension .QFX)

1. Choose the **Quicken** menu **/Account/New** (from the submenu choose the account type such as Checking, Savings, or other)
2. In the *Add Account* window that appears, start typing The First National Bank of Long Island. Select the The First National Bank of Long Island in the list, and click **Continue**.
3. Drag and Drop the downloaded Web Connect .QFX file to the designated area in the *Download Transactions* Quicken window.
4. Click Continue



containing your transactions. Then you'll import the data from t



## KEEPING YOUR QUICKEN ACCOUNTS UP TO DATE

**To download Transactions into your Account Register:**

- 1.** Choose **Accounts/Update Selected Online Account**.
- 2.** Enter Password in the Pop-up dialog box.
- 3.** Click **OK**

Quicken connects to the Internet and downloads your transactions for all the online accounts at The First National Bank of Long Island that you have set up in Quicken.

**CONGRATULATIONS! YOU ARE SET UP AND READY TO USE QUICKEN ESSENTIALS**