



Getting Started with Orange County's Credit Union and Web Connect for Quicken® Windows 2003

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

This guide includes the following sections:

- **Information You'll Need to Get Started, page 1** - Explains the information you will need to have before downloading transactions with Quicken.
- **Activating a Quicken Account to Download Transactions for the First Time, page 2** - Explains how to set up transaction download for your Quicken account.
- **Keeping Your Quicken Accounts Up-to-Date, page 3** - Describes how to download transactions on an ongoing basis.

Information You'll Need to Get Started

Before you activate your Quicken accounts to use Web Connect online account access, you will need to contact the Credit Union for the following information, if you don't already have it. 1-888-354-6228, option 8.

- Number Number
- Personal Identification Number (PIN) or password

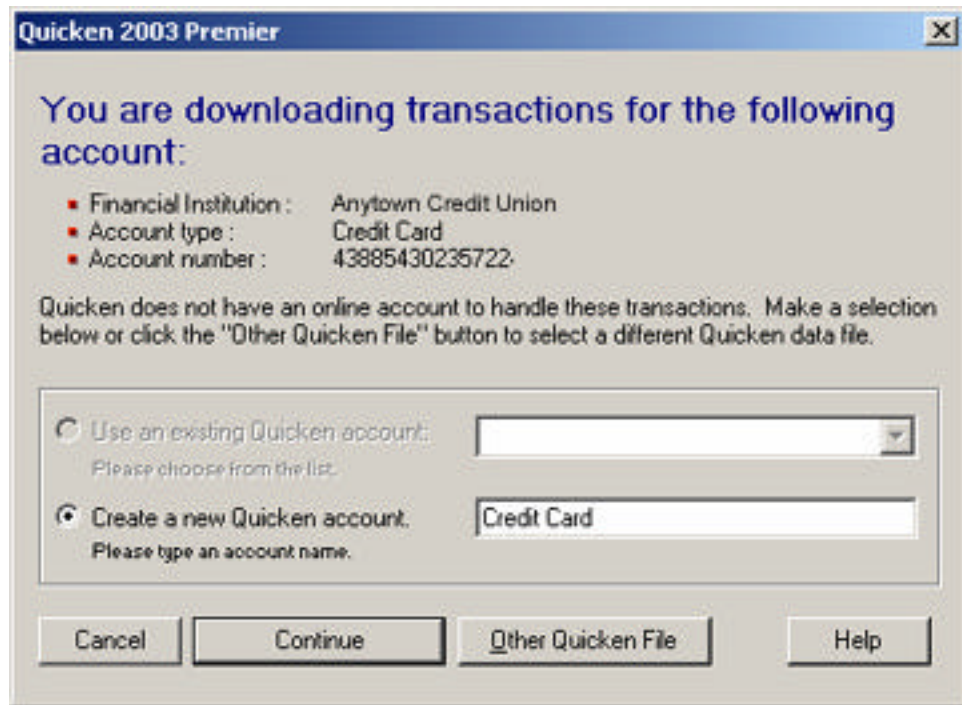
When you have received the necessary information, this guide will show you how to activate your accounts in Quicken and how to use Web Connect Online Account Access.

Activating a Quicken Account to Download Transactions for the First Time

The following steps explain how to activate your existing Quicken account(s) or create one or more new Quicken accounts for Web Connect online access.

- Step 1** Log into the credit union's online banking web site. Click on Account Access, then Export. Select the account and date range you want to download. Then select **Quicken Financial Exchange (QFX)** from the next drop down menu.

Then click on **Download to Quicken**, Quicken displays the following dialog box:



- Step 2** Click the **Use an Existing Quicken** account and select an account from the list, or click the **Create a new Quicken account** radio button and type a name for the account, and then click **Continue**.

Note: You only need to select the account for this first download. After the account is activated for Web Connect account access, future downloads will download to this account automatically.

- Step 3** When Quicken confirms that the Web Connect data has been successfully downloaded to Quicken, click **OK**.

Your first download is complete.

Refer to the following section to download transactions from now on.

Keeping Your Quicken Accounts Up-to-Date

From the Online Center, you can download transactions, view a summary of your transactions, and enter downloaded transactions into a Quicken register.

The screenshot shows the 'Online Center' window with the following callouts:

- Select Orange County's Credit Union here**: Points to the 'Financial Institutions' dropdown menu.
- Click here to view your register and review your downloaded transactions**: Points to the 'Compare to Register...' button.
- After completing your initial Web Connect download, click here to link directly to the Credit Union's website and perform additional downloads**: Points to the 'Update/Send...' button.
- Select an account from this list**: Points to the account list table.
- A summary of downloaded transactions and balances appears here**: Points to the transaction list table.

Account	Transactions	Online Balance
Credit Card at Anytown Credit Union	0	2,527.60
50009597-01 Savings	0	N/A
50009597-60 Line of Credit	0	N/A

Date	Num	Payee	Charge	Payment
7/10/2002	7 ELEVEN 18916		32.21	
7/11/2002	PERIODIC RATE FINANCE CH		33.91	
7/12/2002	TONS R US #5522		17.41	
7/13/2002	Hollywood Video0055210		12.93	
7/14/2002	LYONS RESTAURANT		36.83	
7/15/2002	7 ELEVEN 18916		32.57	

- Step 1** In the Online Center, select Orange County's Credit Union from the Financial Institution list box and select an account from the list of accounts.
- Step 2** Click **Update/Send** to download transactions from your financial institution's website.
- Step 3** Click **Compare to Register** to display the register for the account and a list of your downloaded transactions.

The screenshot shows the 'Register' window for a checking account. A callout box points to the transaction list:

Review your downloaded transactions here

Date	Num	Payee/Category/Memo	Payment	Clr	Deposit	Balance
10/15/2001	5080	Credit Card Mark	2,527.60			-34,350.89
10/15/2001	5081	Sarah Gifts Given	1.00			-34,351.89
10/19/2001	5077	Allstate	400.50			-34,752.39
10/22/2001	5078	Pacific Bell Utilities:Telephone	26.37	c		-34,778.76
10/22/2001	5079	Sprint PCS Utilities:Telephone Cell Phone	30.75	c		-34,809.51
11/1/2001	5074	Mortgage includes \$124.87 principal pymt	2,500.00			-37,309.51

Ending Balance: -37,309.51

Accept Transactions into Register: 0 of 12 completed

Status	Date	Num	Payee	Payment	Deposit	Accept All
Match	10/12/2001		Allstate / Online Pmt 011012	127.65		Done
Match	10/15/2001		Crdt CD / Online Pmt 011015 011015	2,527.60		Accept
Match	10/15/2001		Pacific Gas & El / Online Pmt 011015	94.64		Accept
Match	10/15/2001		AT&T Broadband / Online Pmt 011015	32.70		Accept
Match	10/15/2001		Sarah Shen / Online Pmt 011015	1.00		Accept
Match	10/19/2001		Allstate Insur / Online Pmt 011019	400.50		Accept
New	10/15/2001	ATM	ATM Withdrawal - 10/15 / 590 Castro St, Mountain View, CA 2059	100.00		Accept
New	10/18/2001	1630		150.00		Accept
New	10/18/2001	1631		25.00		Accept
New	10/19/2001		Intuit / Reg.Salary 101901		435.53	Accept
New	10/22/2001	ATM	ATM Withdrawal - 10/21 / 605 N.W. 23Rd, Portland, OR 2059	80.00		Accept
New	10/22/2001	1633		169.75		Accept

Online Balance: \$6,405.86 As of: 10/23/2001

- Step 4** Review your transactions and determine how to accept them into your register:
- To accept all transactions, click **Accept All**.
 - To accept an individual transaction, select that transaction and click **Accept**.
 - To make a change to an individual transaction, select that transaction and click **Edit**.
- Step 5** After you have accepted all transactions, click **Done**.