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

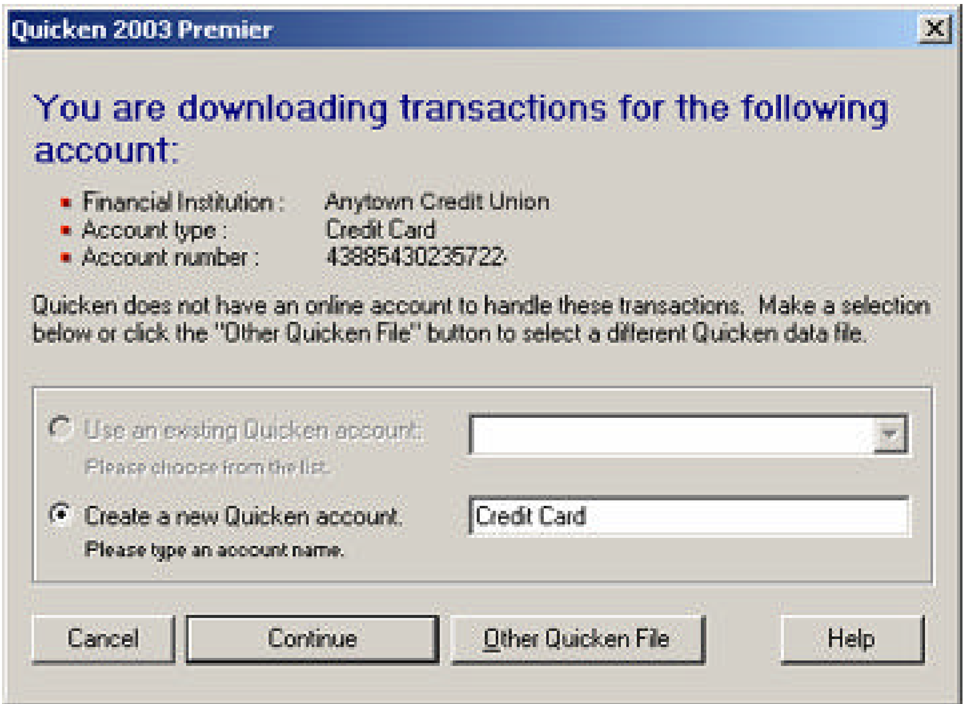
When you have received the necessary information, this guide will show you how to activate your accounts in Quicken and how to use Web Connect Online Account Access.

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.

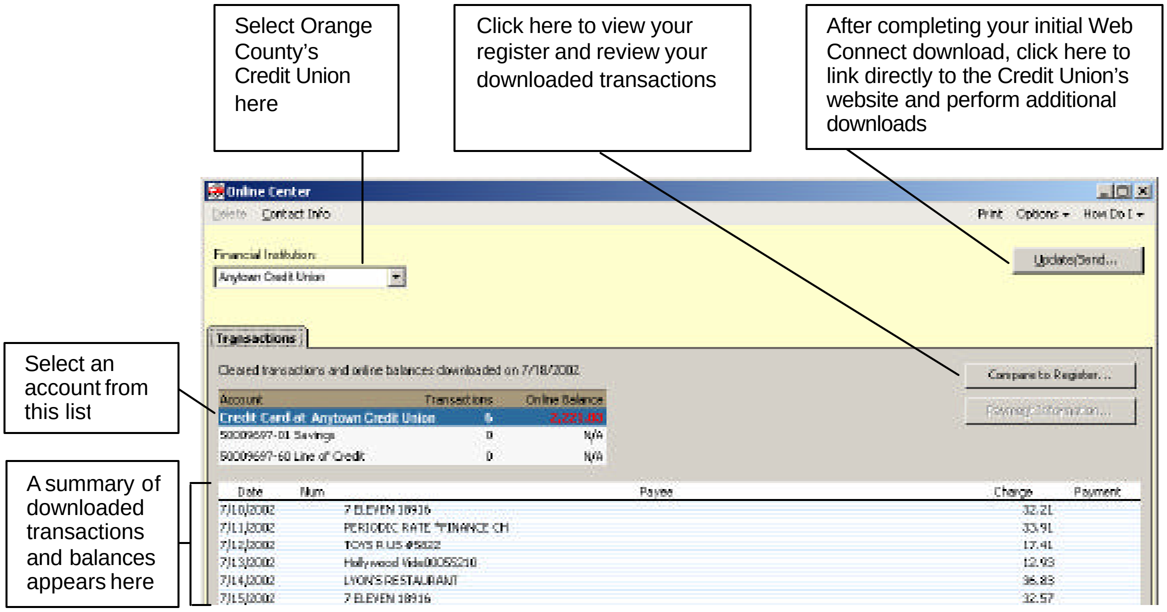
Step 3 When Quicken confirms that the Web Connect data has been successfully downloaded to Quicken, click **OK**.

Your first download is complete.

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

Keeping Your Quicken Accounts Up-to-Date

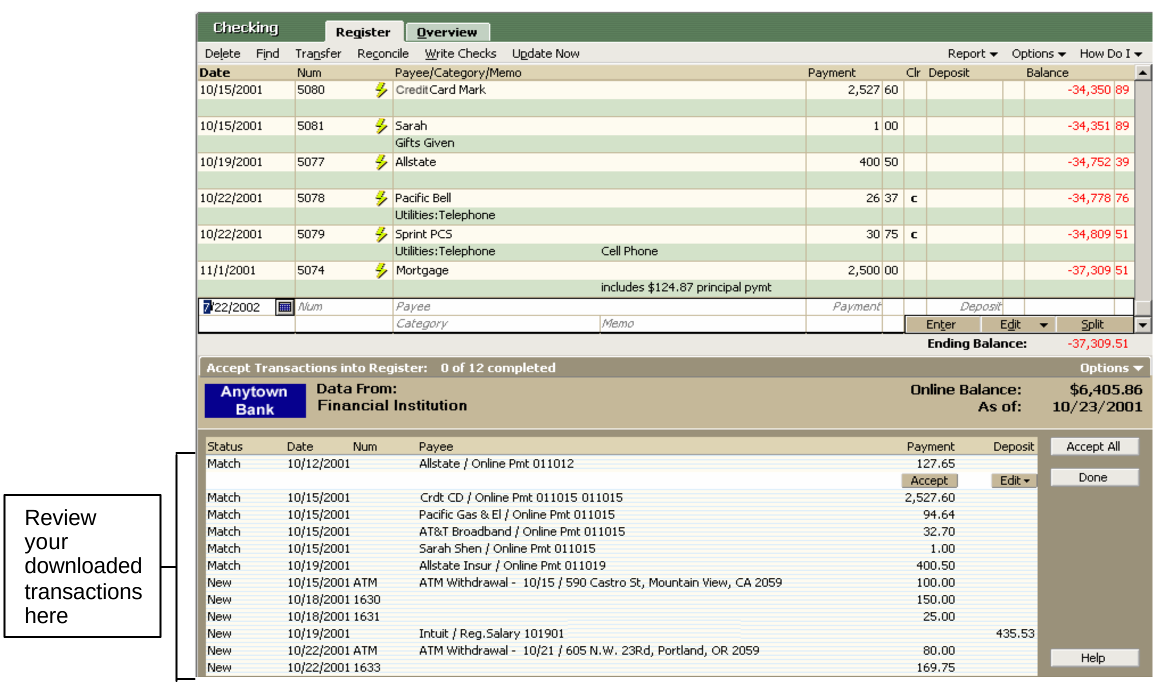
From the Online Center, you can download transactions, view a summary of your transactions, and enter downloaded transactions into a Quicken register.



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.



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**.