



Getting Started with Web Connect for Quicken® Windows 2003 (For former QIF import users)

Refer to this guide for instructions on setting up your accounts for Web Connect (WC) and downloading transactions on an ongoing basis.

This guide includes the following sections:

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

An Improved Download Experience

Web Connect offers members, like you, a significant improvement in the download experience. Orange County's Credit Union is participating with Web Connect download to Quicken. Now you can enjoy an easier, faster and more accurate download, without having to import and find your file or worry about duplicates! Unlike QIF, Web Connect was developed for handling online financial transactions – you'll immediately see the difference:

- Download directly into Quicken (no file import)
- Quicken automatically starts when downloading
- Superior transaction matching
- In most cases, the date range for new transactions is selected automatically (even if you enter an older beginning date, duplicates will generally be removed)
- Easier account reconciliation
- Create new Quicken accounts easily when one doesn't exist
- Credit Union and Quicken accounts are linked
- Technical Support is available

The conversion from QIF to Web Connect is a simple process, which will only take a few minutes of your time. **You can continue using the same account; you'll just need to activate it for Web Connect.**

Information You'll Need to Get Started

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

Your Member Number and PIN will be the same as same what you are currently using to access your accounts online.
- **Finish reviewing any new QIF transactions** in the account register you use for QIF by clicking Accept, or Accept All – see steps 3-4 in the section "Keeping Your Quicken Accounts Up-to-Date".

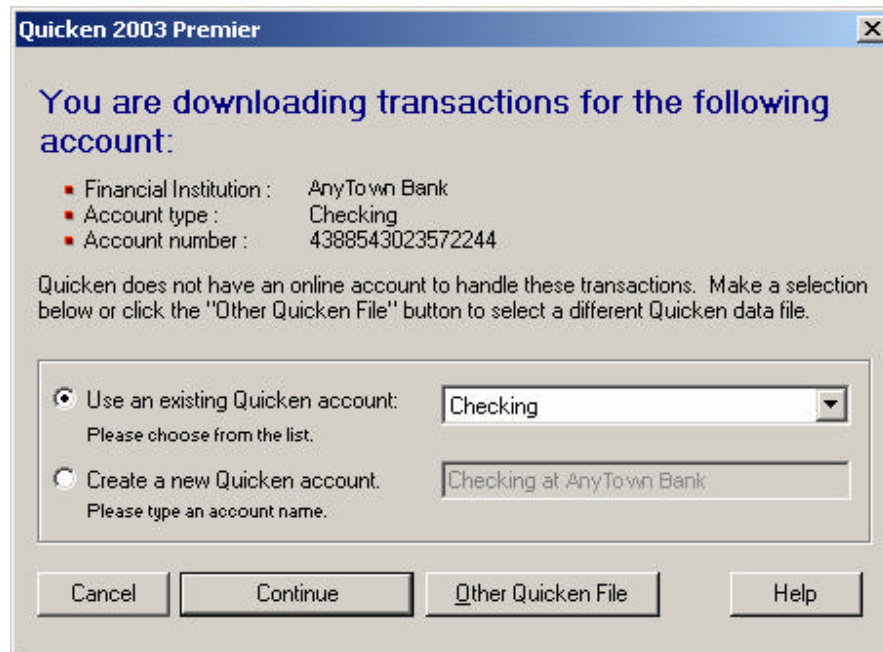
Activating a Quicken Account to Download Transactions for the First Time

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

- 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 men.

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

When you click **Download Data**, Quicken displays the following dialog box:



- Step 2** To continue using the same account register, select **Use an Existing Quicken** account and choose an account from the list (all your previous transactions will remain intact in your register). Or, if you want to create a new account, 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.

NOTE: You will need to repeat these steps for each account you wish to download.

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

Keeping Your Quicken Accounts Up-to-Date

Tip: You can also continue to download directly from your financial institution's web site exactly as you did in step 1 of the previous section.

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 Institution' 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 your financial institution's website and perform additional downloads:** Points to the 'Update/Send...' button.
- Select an account from this list:** Points to the account list in the 'Transactions' section.
- A summary of downloaded transactions and balances appears here:** Points to the transaction table.

Account	Transactions	Online Balance
Credit Card at Anytown Credit Union	5	\$2,221.88
50009597-01 Savings	0	N/A
60009597-60 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	FOYS R US #5822		17.41	
7/13/2002	Hollywood Vids0055210		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 the Credit Union'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 'Checking' Register window with the following callout:

- Review your downloaded transactions here:** Points to the transaction list in the register.

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

Status	Date	Num	Payee	Payment	Deposit	Accept All
Match	10/12/2001		Allstate / Online Pmt 011012	127.65		Accept
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 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 Withdrawal - 10/21 / 605 N.W. 23Rd, Portland, OR 2059	80.00		Accept
New	10/22/2001	1633		169.75		Accept

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**.