



# Quicken 2017 for Windows Getting Started Guide for Financial Institutions

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*Financial Institution Support – OFX Connectivity Group*

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# Quicken 2017 for Windows

## Getting Started Guide

*Thank you for choosing Quicken!*

### About this Guide

This guide helps you get started with Quicken 2017 as quickly as possible. You'll learn:

- What you will need to get started
- How to set up an account for online banking (Direct Connect)
- How to set up an account for online banking (Web Connect & Express Web Connect)
- How to update an account setup for online banking
- How to set up Bill Pay (Direct Connect-only)

### New in Quicken 2017 for Windows

Quicken 2017 maintains the same online banking connectivity features, along with some new features not found on previous versions.

#### **Refreshed User Interface**

- New look and feel for Quicken User Interface.
- Easier to read and navigate.
- Consistent and standardized interaction across the product.
- A new and modern reporting visualization.

#### **Investments on Mobile**

- Now sync all your investment accounts, balances, holdings and securities to mobile.
- Get anytime anywhere access to your investment portfolio balances.
- Get real time quote updates on your securities directly on mobile.
- You can now track the securities that you are watching, on your mobile too.

#### **Integrate Quicken with Zillow**

- Home owners can now automatically pull the home value from Zillow, into Quicken.
- Use Zillow estimate to track the home value on register using adjustment entries.
- Choose whether you want to use the Zillow value or to track the home value manually.

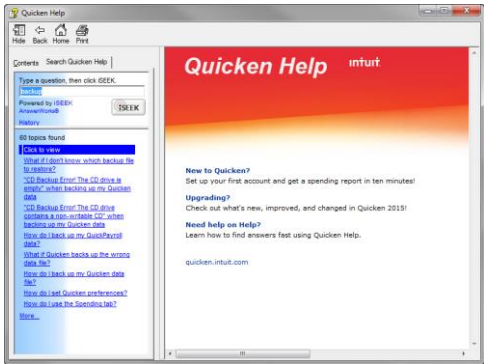
# Connect and Update your Data

Before you set Quicken to download transactions you may need to contact your financial institution (FI) for the following information:

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

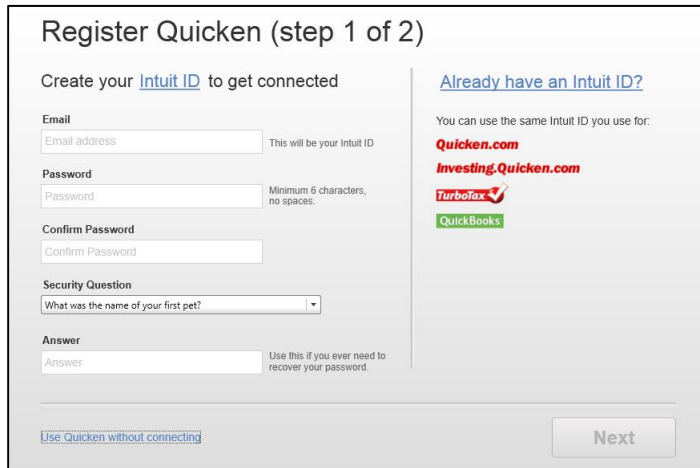
For Quicken Web Connect/Express Web Connect accounts, use the same customer ID and PIN/password as your financial institution website. For Direct Connect, they may be different. Please contact your financial institution to verify your Direct Connect login information.

**IMPORTANT:** We recommend that you back up your Quicken Data File before setting up online banking accounts for the first time. Choose **Help > Quicken Help** and search for **Back Up** for backup instructions.



## Register a Quicken Data File with an Intuit ID

When you set up an account for online banking, Quicken requires you to register your Quicken data file with an Intuit ID. If you already use other Intuit products, like TurboTax or QuickBooks, you may already have an Intuit ID.

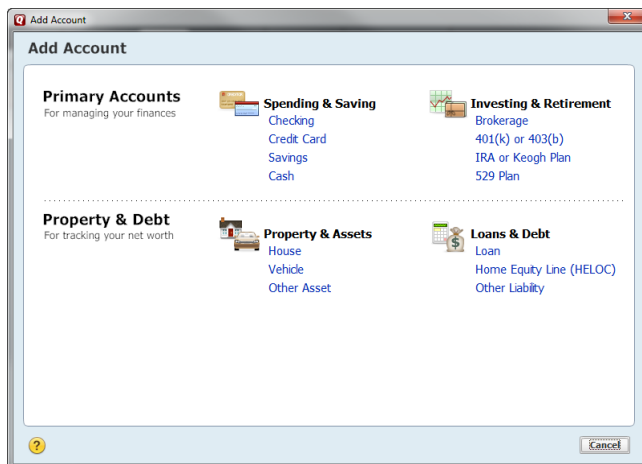


Fill in the information to set up your Intuit ID and complete your registration

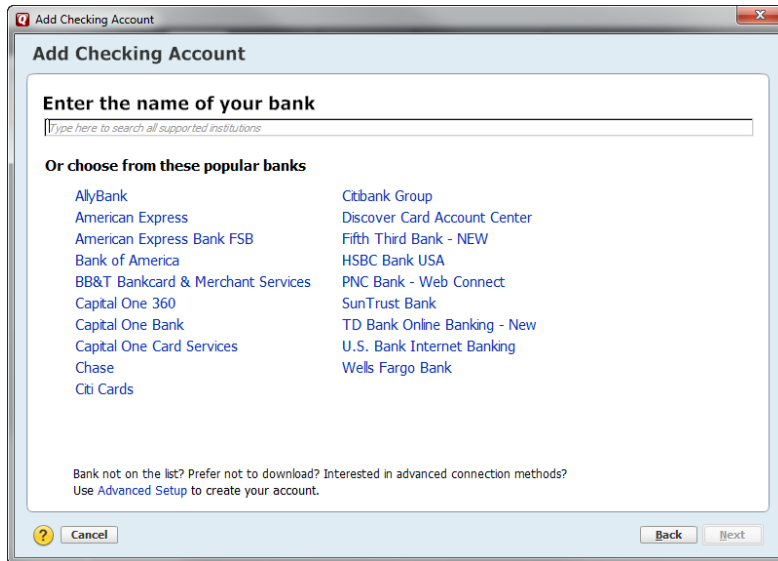
If you already have an Intuit ID, click "Already have an Intuit ID" on the right and sign in to complete your registration

## Set Up an Account for Online Banking (Direct Connect)

1. Choose **Tools > Add Account...**
2. Click the type of account you want to set up.



3. After you choose the type of account you want to add, you will see the financial institution selection screen. Type the name of your financial institution to filter the list.



4. When your financial institution name appears in the filter results, click your financial institution's listing and click **Next**.

**NOTE:** Be sure to select the correct financial institution, because some financial institutions may appear more than once. If you have any questions about which listing to choose for Direct Connect, please contact your financial institution.

5. Quicken will now display a login screen: type your Direct Connect credentials and follow the prompts to add your accounts to Quicken 2017.

## Set Up an Account for Online Banking (Web Connect)

1. Log into your financial institution's web site.
2. Download your transactions according to your financial institution's instructions.
3. If you are given a choice for your download format, choose "Quicken Web Connect (\*.QFX)" and save the file to your computer.

**NOTE:** These instructions assume you will save the download to your computer. If you "open" it instead, your web browser should open Quicken and begin to import the transactions. If you plan to open the file directly, we recommend that you have your Quicken data file open in Quicken 2014 before you begin Step 2.

4. Open Quicken, then choose **File > File Import > Web Connect File...** You will see an import dialog.

5. Navigate to and select the file you downloaded in Step 2, then click Open.
6. Click Link an Existing Account if you have an appropriate account in the account list. If you don't have an account yet, click Create a new account and enter a nickname for that account.
7. Click Import.
8. Click OK to confirm and finish.

## Set Up an Account for Online Banking (Express Web Connect)

1. Choose **Tools > Add Account...**
2. Select the type of account you want to set up.
3. After you select the type the name of account you want to add, you will see the financial institution selection screen. Type the name of your financial institution to filter the list.
4. When you see your financial institution's name in the filter results, click to select it, and click **Next**.
5. Quicken will now display a login screen: type the credentials you use to log in to your financial institution's website and follow the prompts to add your accounts to Quicken 2017.

**NOTE:** During the Express Web Connect setup, you might be asked to enter your Multi-Factor Authentication information. This could be a series of security questions, a one-time passcode, etc.

## Updating Accounts: The One Step Update

After an account has been set up for online banking, you can use One Step Update to update information:

1. Choose **Tools > One Step Update...**
2. Enter the necessary information for the listed accounts (such as passwords or user ID) and click **Update Now**.
3. Follow the instructions to update your accounts.

## Set Up Bill Pay (Direct Connect)

Some financial institutions offer Direct Connect subscribers the ability to send payments directly from within Quicken. If your financial institution offers Bill Pay services, this feature is turned on during the Direct Connect account setup.

**NOTE:** Contact your financial institution if you have any questions about Bill Pay enrollment processes and capabilities.

## Adding an Online Payee

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.

1. Choose Tools > 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, and press the TAB key.
4. In the Set Up Online Payee window, enter your payee's contact and account information, then click OK.
5. Review the information on the Confirm Online Payee Information dialog, then click Accept to continue (if you need to edit the information, click Cancel and make any changes).

## Creating an Online Payment

After you have added your online payees, you are ready to create an online bill payment.

1. Choose Tools > Online Center.
2. Choose your financial institution from the drop-down list.
3. Select the Payments tab, and type your payee's name in the Payee field.
4. Fill in the remaining fields for the payment that you wish to make (payment amount, processing or delivery date, category, and memo) then click Enter.
5. Click Update/Send... to send your payment.