Getting Started with Transaction Download in Quicken 2004-2005 using Direct Connect

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

This guide includes the following sections:

Information You'll Need to Get Started

To download your transactions with Quicken, you must have Internet access. In addition, to complete setting up your Quicken accounts for transaction download you will need to enter a Customer ID and PIN. This will be your Alpine Online ID and Password.

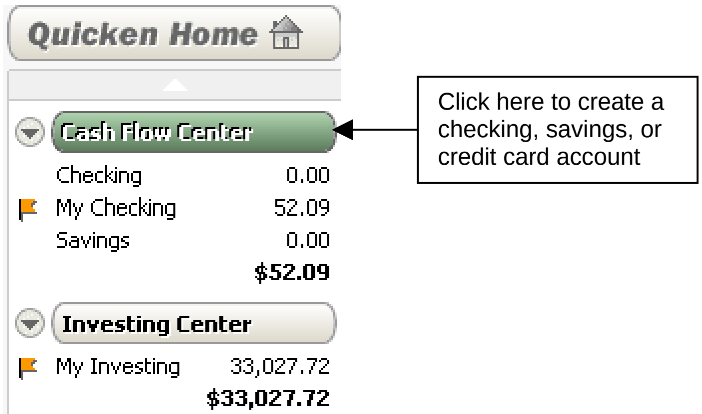
This guide will show you how to setup and download your accounts. For step-by-step help with an online task, choose **Learn About Downloading Transactions** from the Quicken **Help** menu.

Important: First, get the latest program updates!

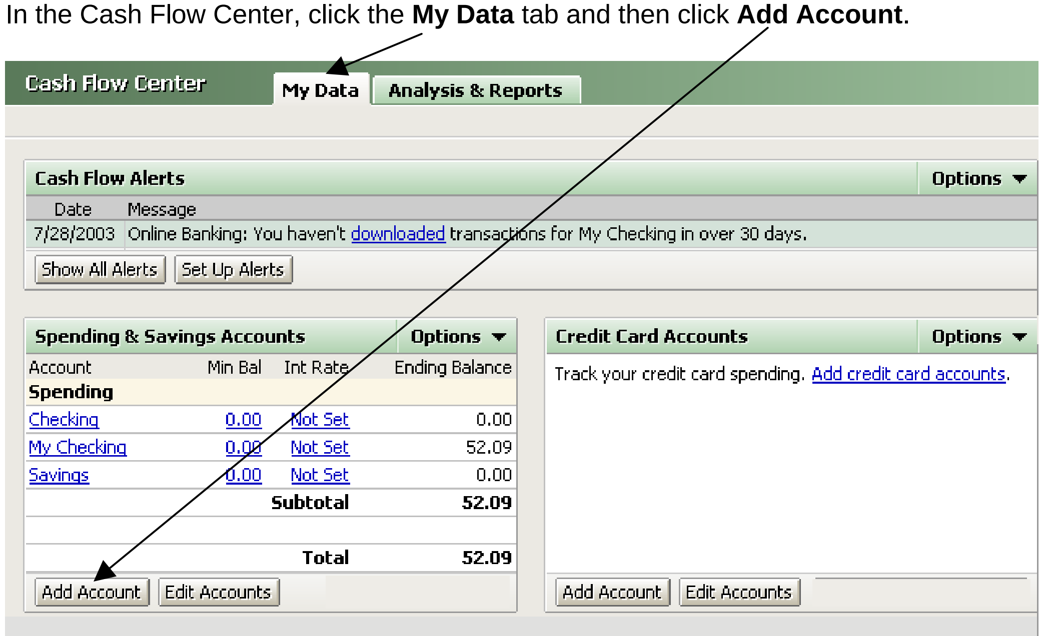
To get the latest directory of participating financial institutions and program updates click **Update** on your Quicken toolbar. In the dialog, click **Update Now**, Quicken will automatically check for available updates. When this download process is complete, **exit** and **restart** Quicken.

Creating a New Quicken Account (Using Express Setup)

Step 1 From the Account Bar, click **Cash Flow Center.**



Step 2 In the Cash Flow Center, click the **My Data** tab and then click **Add Account**.



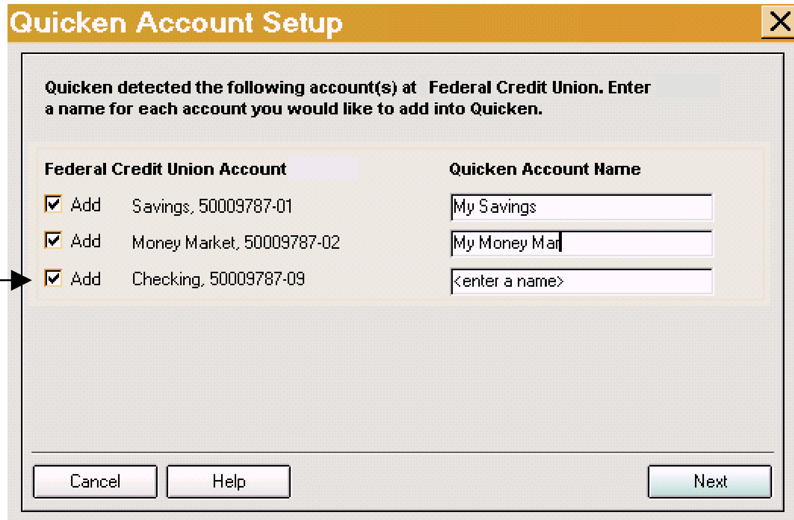
Step 3 Enter Alpine Bank in the financial institution selection dialog and click **Next**.

Step 4 Click **Next** to accept the **Online** option in this dialog. Note, that you can download any of the account types listed under **Download Availability**.

Step 5 The next dialog asks for your **Customer ID** and **PIN**, enter this information. If you're unsure about which ID/PIN to use, see the information under "Need a Customer ID and PIN?" to the right in this dialog. Click **Next.**

Step 6 Specify a Quicken account name, or use an existing Quicken register if you are presently manually entering transactions. Click **Next** when you have specified how Quicken should handle each online account.

To ignore the selected online account, click the **Add** checkbox. Quicken will not download transactions from this online account



Simply name each account that you'd like to add to Quicken

. . . then click **Next**

Step 7 Click **Next** to create all the account registers and download transactions into Quicken. Congratulations! For instructions on downloading account information on an on-going basis, see the "Keeping Your Quicken Accounts Up-to-Date" section.

Keeping your Quicken Accounts Up-to-Date

Step 1 To download transactions directly from your account register, go to the account via the account bar, and then click **Download Transactions** located at the bottom of your account register.

Step 2 Follow the on-screen instructions to complete downloading transactions.

Updating Accounts from the Online Center

The **Online Center** also lets you easily download transactions to the accounts that you have activated for online account services.

Easy Access: From the **Online** menu, select **Online Center**.