

# Getting Started with Investment Download in Quicken 2004-2006

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:

**Creating a New Quicken Account, page 2**—Explains how to use Express Setup to create a new Quicken account for downloading transactions.

**Keeping your Quicken Accounts Up-to-Date, page 4**—Explains how to download transactions from accounts that you have activated for online account services.

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## 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 or online bill payment services you will need to enter a Customer ID and PIN.

You will need to enter your current NetExchange Client ID preceded by the financial organization number in the Customer ID field while logging in to setup accounts in Quicken. For example, if your ID is johndoe and your correspondent number is 123, you will need to enter this information as 123johndoe in the ID field. For the PIN field, you can enter the same information as you would enter in the password field on NetExchange Client.

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!

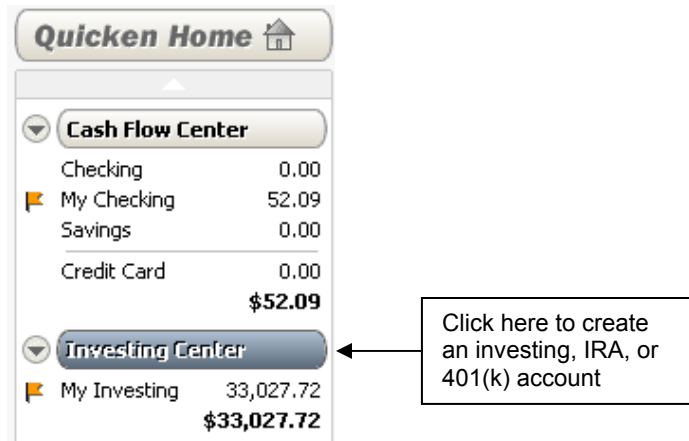


To get the latest directory of participating financial institutions and program updates click **Update** on your Quicken toolbar. In the dialog, click **Update Now**, Quicken will automatically check for available updates. When this download process is complete, **exit** and **restart** Quicken.

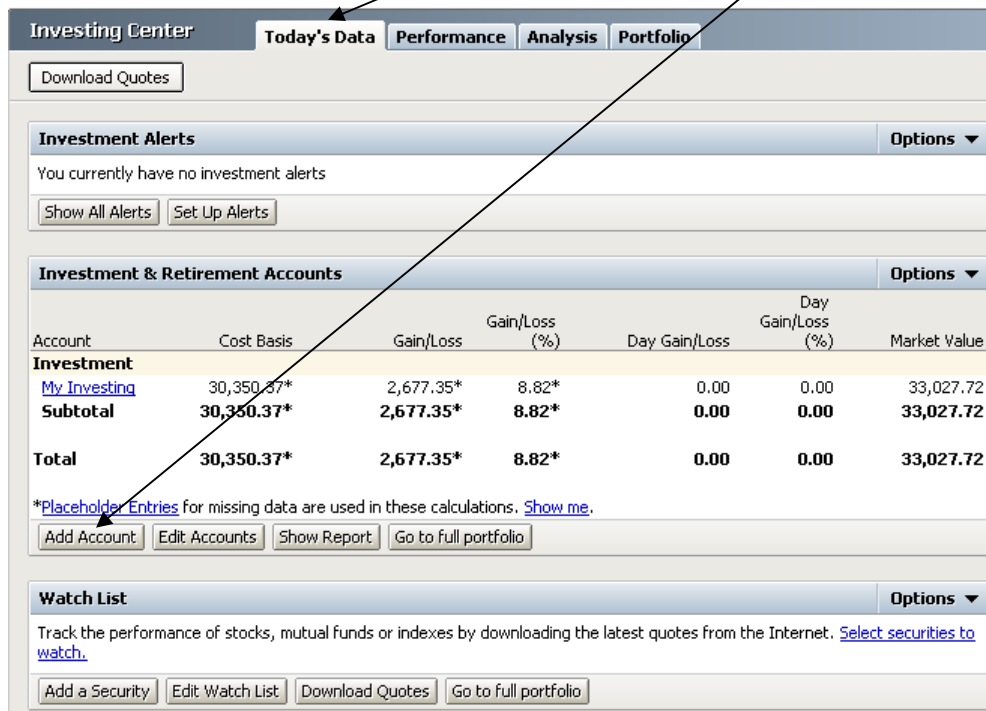
Our Financial Organization # is ACT. When you are prompted to enter your NetExchange Client User ID, insert "ACT" directly in front of your user ID.

## Creating a New Quicken Account (Using Express Setup)

**Step 1** From the Account Bar, click **Investing Center**.



**Step 2** In the Investing Center, click the **Today's Data** tab and then click **Add Account**.



**Step 3** Enter NetExchange Client 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**. If this is a 401(k) account check that it is listed here. You may need to reselect the financial institution in Step 3 to specify retirement services. Click **Next**.

**Step 5** The next dialog asks for your **Customer ID** and **PIN**, enter this information. It should be same ID and password as in the website

**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.

The screenshot shows the "Quicken Account Setup" dialog box. At the top, it says "Quicken detected the following account(s) at Federal Credit Union. Enter a name for each account you would like to add into Quicken." Below this, there is a table with two columns: "ABC Broker Accounts" and "Quicken Account Name".

ABC Broker Accounts	Quicken Account Name
<input checked="" type="checkbox"/> Add Investing 50009787	My Investing Account
<input checked="" type="checkbox"/> Add Money Market, 50009787-02	My Money Mar
<input checked="" type="checkbox"/> Add Checking, 50009787-09	<enter a name>

At the bottom of the dialog box are three buttons: "Cancel", "Help", and "Next".

Callouts:

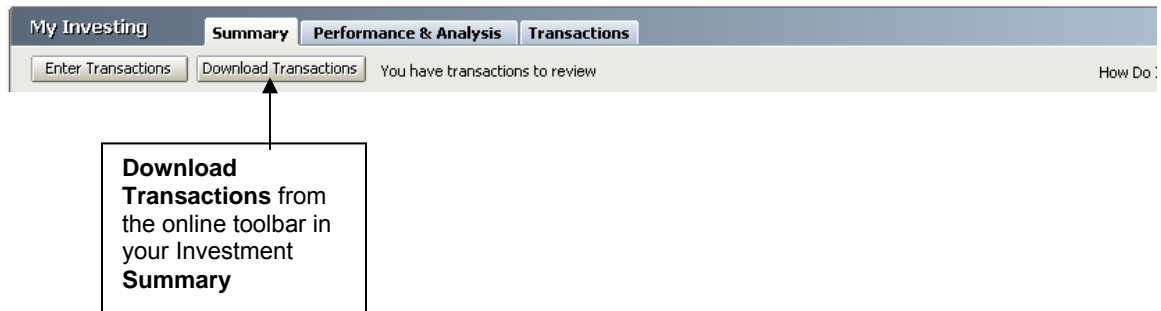
- A box on the left points to the "Add" checkboxes: "To ignore the selected online account, click the **Add** checkbox. Quicken will not download transactions from this online account".
- A box on the right points to the "Quicken Account Name" input fields: "Simply name each account that you'd like to add to Quicken".
- A box on the right points to the "Next" button: "... then click **Next**".

**Step 7** Click **Next** to create up to 6 account registers and download transactions into Quicken. Repeat this setup process if you hold any additional accounts. Congratulations! For instructions on downloading account information on an on-going basis, see the "Keeping Your Quicken Accounts Up-to-Date" section. **Important Note for IRAs:** If this is an IRA account see "Convert a brokerage account to an IRA" in the Online Help for Quicken.

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## Keeping your Quicken Accounts Up-to-Date

- Step 1** To download transactions directly from your investment account, go to the account via the account bar, and click **Download Transactions** located at the top of your Investment **Summary**.
- Step 2** Follow the on-screen instructions to complete downloading transactions.



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## Updating Accounts from the Online Center

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

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

