Getting Started with Transaction Download and Online Bill Payment in Quicken for Mac 2007

Refer to this guide for instructions on using Quicken for Mac'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 and paying bills online.

Keeping your Quicken Accounts Up-to-Date, page 3—Explains how to download transactions or make payments with accounts that you have activated for online account services.

Using Online Bill Payment, page 4—Describes how to set up an online payee and create an online payment.

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 the following information:

- Customer ID
- PIN
- Account Number
- Routing Number

To obtain your PNC customer ID and password, complete an [Online Banking with Quicken Application](#) at pnc.com, or call 800-762-2035 to apply by phone.

This guide will show you how to setup and download your accounts. For step-by-step help, choose Quicken Help from the Help menu.
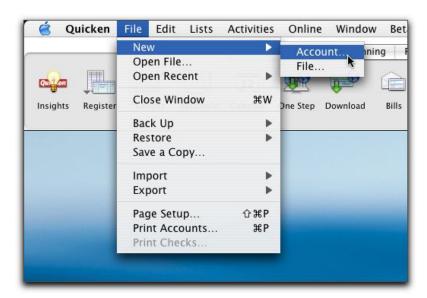
Important: First, get the latest program updates!

From the **Quicken 2006 (**or 2007**)** menu, select **Check for Updates** and follow the on-screen instructions.

Creating a New Quicken Account (Using Express Setup)

Step 1 From the **File** menu, select **New Account.**

Step 2 In the window that appears start typing **PNC Bank**. Once **PNC Bank** is selected in the list click **Continue**.

Step 3 During the next 5 screens you will,
1 – select the account type (e.g. checking, savings, credit card, line of credit)
2 – name the account
3 – choose **Online** setup
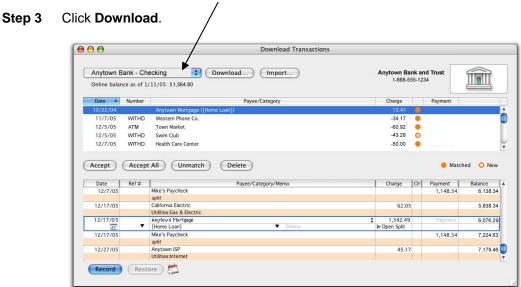4 – enter your Customer ID and PIN

PNC requires that you change your Quicken PIN/password the first time you connect using the Direct Connect service. Quicken PINs/passwords must be 4 characters in length and must contain all numbers.

5 – enter your Account Number and Routing Number, if applicable

If you're unsure about which ID/PIN to use read the notes below, and then follow the onscreen instructions to complete online setup.

Keeping Your Quicken Accounts Up-to-Date

Step 1   From the **Online** menu, choose **Download Transactions**.

Step 2   Choose **PNC Bank** and an account from the selector pop-up menu in the upper left of window.

Step 3   Click **Download**.

Step 4   Enter your PIN Vault password or click Bypass PIN Vault and enter the PIN assigned to you by **PNC Bank** for use with Quicken.

Quicken connects to the Internet and downloads your transactions for all online accounts at **PNC Bank** that you have set up in Quicken.

Working with your downloaded transactions

Step 1   Select each transaction that you want to add to your register. You can hold down the Command key and click additional transactions to select multiple transactions. If you make a mistake and want to deselect a transaction, click it again.

Step 2   Click **Accept** to record the selected transactions, or **Accept All** to record all transactions. The accepted items are added to your register, marked C (cleared) and removed from the transaction list.

Using Online Bill Payment

Sending online payments with Quicken is a fast and easy way to pay your bills. It requires two steps: setting up an online payee and creating an online payment.

Set Up an Online Payee

An online payee can be any business, organization, or individual to whom you make payments. You have to add each online payee to the **Payees** list only once; all Quicken accounts share this list.

Step 1   From the **Online** menu, choose **Payments** and then choose **Online Payees**.

Step 2   Click **New** and complete all fields on the screen.

Step 3   Click **Create**. Review the information for accuracy and click **Yes**.
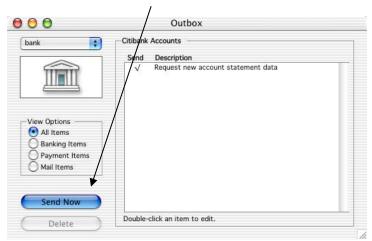
To edit, click **No** and make any necessary changes.

Create an Online Payment

After you create an online payee, you are ready to create an online payment.

Step 1   From the **Online** menu, choose **Payments** and then choose **Enter Payment**.

Step 2   In the Enter Online Payment window, enter the name of the online payee you just set up. Enter the amount of the payment and category (optional).

Step 3   Click **Put In Outbox**.

Quicken saves this payment in the Outbox. You can create other online payments and add them to the Outbox.

Step 4   When you are ready to send your payments, choose **Outbox** from the **Online** menu and then choose **Send Now**.

Step 5   Enter your PIN Vault password or click Bypass PIN Vault and enter your PIN for **PNC Bank**.

You will connect to the Internet and your payment instructions will be sent.

CONGRATULATIONS, YOU ARE SET UP AND READY TO USE QUICKEN!

If you have any questions regarding these instructions, you may contact us at 800-762-2035. A customer service representative will be available to assist you from 7:00 am - 12:00 midnight ET, Monday - Saturday; 8:00 am -12:00 midnight ET, Sunday. You may also refer to: http://www.intuit.com/support/quicken.