

[Lesson Menu](#)[Lesson Feedback](#)[Print](#)[Next Lesson](#)

Lesson 1: Setup



STEP 1 SETTING UP YOUR ACCOUNTS

Quicken can track almost any account you own. To keep it simple, start with just two:

- Your primary checking account
- Your most active credit card

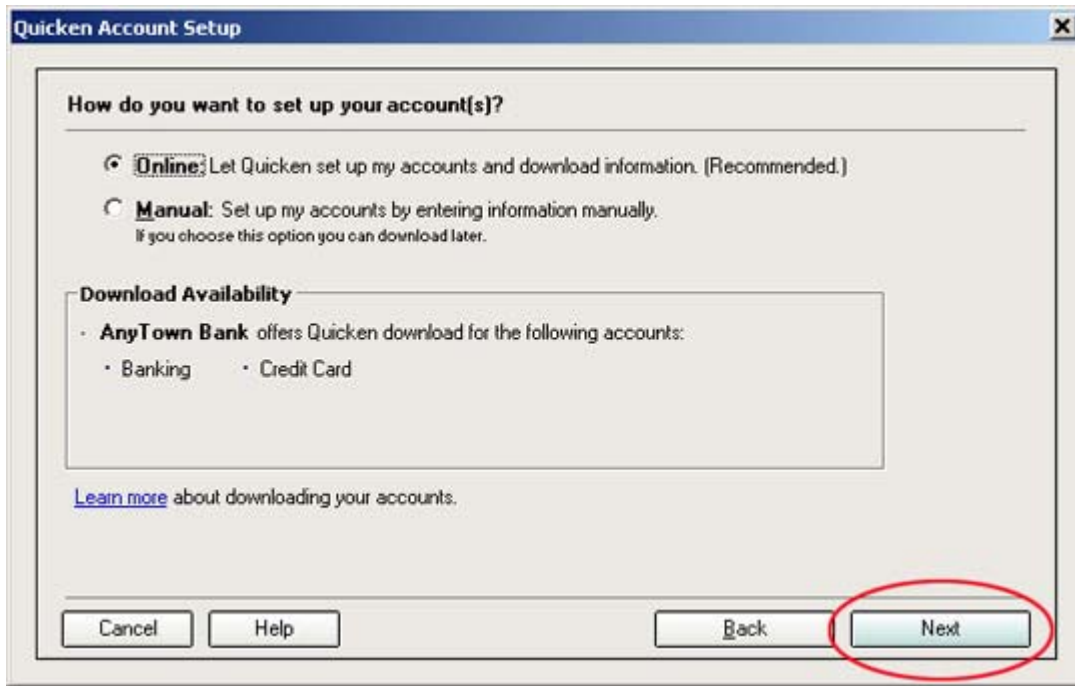
STEP 2 ADD YOUR PRIMARY CHECKING ACCOUNT

Your primary checking account is the one where you deposit your paycheck or other income and pay your bills. Quicken walks you through the account setup process.

1. Choose **Cash Flow menu > Go to Cash Flow Center**.
2. If it is not already open, click the **My Data** tab.



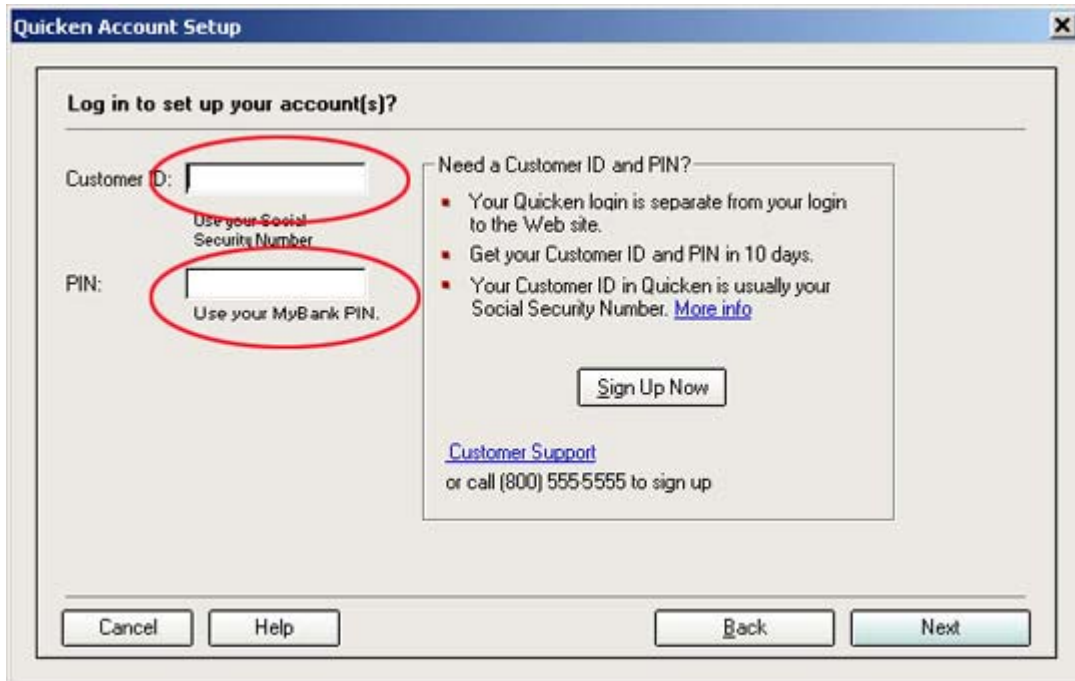
If your financial institution supports online account services, Quicken makes it easy to set up online downloads. If you need help deciding, see "Choosing Manual or Online."



Click **Next**.

If you choose online setup, Quicken can greatly simplify the setup process by downloading the account balance and all available transactions. What you see next depends on the online service your bank offers and whether you have a PIN. Participating banks will either support Direct Connect or Web Connect. Instructions for both follow; you'll only need to follow the instructions for the type of downloading that your financial institution supports.

If Quicken prompts you for a customer ID and PIN, this means that your bank offers "Direct Connect" online download services to Quicken.



Enter your customer ID and PIN and follow the on-screen instructions. Quicken will download your transaction history for you. In the future, you can keep your information current by downloading transactions for all your accounts at that institution from within Quicken.

However, if Quicken connects to your bank's web site, then your bank offers "Web Connect" online account services in Quicken.

Log on to the web site as you usually do, and then navigate to your transaction history. Look for a link or button labeled **Download**, and follow the on-screen instructions.

AFTER YOUR FIRST DOWNLOAD

Your first download can happen two different ways, depending on your bank's setup:

- During your first download, Quicken enters your transaction history automatically. It may also assign categories to the transactions. Confirm that Quicken assigned the categories the way you want to see your information and edit them if necessary. For more information, see the [Learn About Categories](#) section in Lesson 2.
- Quicken downloads transactions and then gives you a chance to review and accept them. Be sure to assign a category to each transaction. For more information, see [Download Transactions](#).

IF YOU DON'T HAVE A CUSTOMER ID AND PIN

1. If you don't have a PIN, click **Sign Up Now** and Quicken will walk you through the steps to get a PIN. When you contact your bank, be sure to specify that you want a PIN for online account services in Quicken.
 - This PIN may or may not be the same as the PIN for your bank's web site.
 - You may receive your PIN immediately or your bank may mail a printed response later up to 10 days later. In the meantime, you can still set up manually and use all manual features.
2. When you close your bank's web site again, Quicken gives you a chance to enter the customer ID and PIN (if your bank provides it immediately), or to wait (if your bank must mail it to you).

YOUR BANK GAVE YOU A CUSTOMER ID AND PIN. NOW WHAT?

Quicken remembers where you left off. After a few days have passed, the software asks if you have received your PIN and reminds you to enter your new customer ID and PIN. (If you receive it before then, just click **Setup Online** at the top of your account register.)

WHAT'S NEXT AFTER ONLINE SETUP?

First, repeat the setup process for your most active credit card.

1. Choose **Cash Flow menu > Go to Cash Flow Center**.
2. If it is not already open, click the **My Data** tab.
3. In the Credit Card Accounts snapshot, click **Add Account**.

From now on, just download your transactions and assign categories.

If you've finished adding your first two accounts, you're ready to move on to [Lesson 2: Tracking Your Income and Expenses](#), where you'll learn about categories, transactions, and reports to see where your money is going. [Continue >>](#)

Your feedback is important to us. Please take a moment to give us your input on these lessons by taking our short survey.

[Lesson Menu](#) | [Lesson Feedback](#) | [Print](#)

[Next Lesson](#)



© 2006 Intuit Inc.

[Affiliate Program](#) | [Legal Notice](#) | [Terms of Service](#) | [Privacy](#) | [Quicken Software License Agreement](#) | [Feedback](#)