

# GETTING STARTED WITH QUICKEN® 2011, 2010, and 2009, for Windows®



Refer to this guide for instructions on how to use Quicken's online account services to save time and automatically keep your records up to date. This guide will be broken up into product versions, please be sure to follow the steps that apply to the version of Quicken you are currently utilizing.

Before you can download your transactions with Quicken you will need internet access, your Simmons First Bank Anywhere ID and your Simmons First Bank Anywhere password.

**This Getting Started Guide contains the following information:**

- **Downloading the Latest Quicken Updates-** How to download free product updates as they become available for your version of Quicken.
- **Creating a New Quicken Account-** How to use the Express Setup to create a new Quicken account for downloading transactions and paying bills online.
- **Keeping Your Quicken Accounts Up to Date-** How to download transactions or send payments with accounts that you have activated for online account services.
- **Using Online Bill Payment-** How to set up an online payee and create an online payment.

For step-by-step instructions with an online task (or any other Quicken question) go to Help → Quicken Help → select the Search Quick Help tab and type in the topic and click Ask.

## DOWNLOADING THE LATEST QUICKEN® UPDATE (Applies to all product versions)

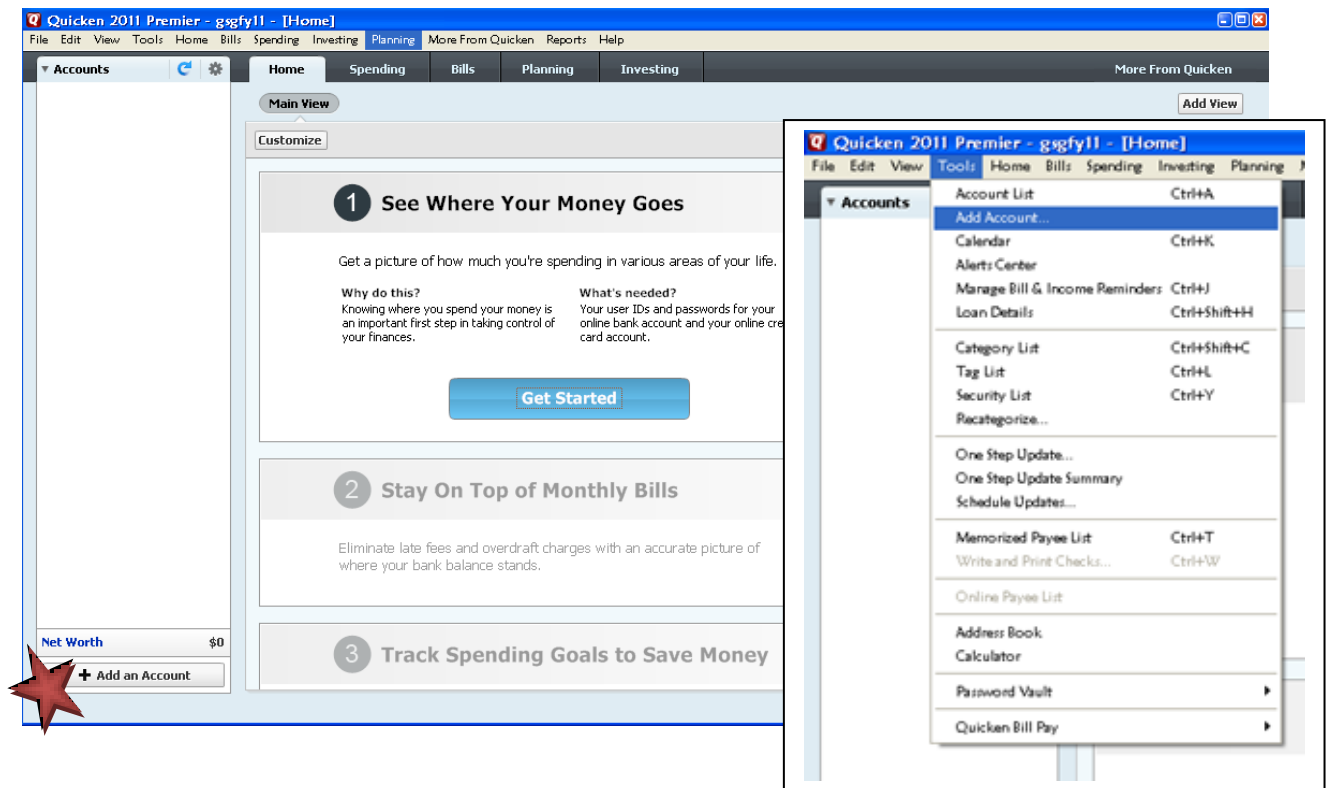
1. Click the Update icon on the Quicken toolbar.
2. Uncheck all boxes → Update Now in the One Step Update Settings dialog.
3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.



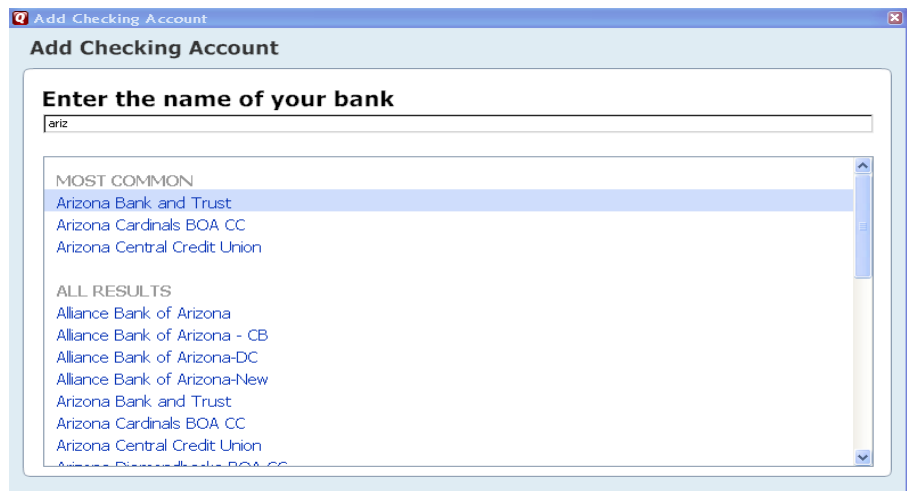
4. When the update is completed, close Quicken. Reopen Quicken.

## CREATING A NEW QUICKEN ACCOUNT 2011

1. To add a new account Launch Quicken 2010 → Click on the Tools drop down menu → then select the Add Account option or Click the Add an Account button



2. On the Add Account window select the type of account you will be setting up → Click Next. Enter the name “Simmons First” → then click the Next button.



3. Enter your Simmons First Bank Anywhere ID and Simmons First Bank Anywhere password  
→ Click Next to continue.

**Add Checking Account**

**Arizona State CU**  
WEB: [www.azstcu.org](http://www.azstcu.org) | TEL: 1-800-671-1098

**User ID**  
For your online Arizona State CU account

**Password**  
For your online Arizona State CU account

Save this password

**Your credentials are safe with Quicken**  
We use bank-level encryption to secure your login credentials, they cannot be compromised  
We use a read-only connection to your bank. We cannot move or transfer money  
[Learn more about our security](#)

Cancel Back Connect

4. All downloadable Quicken accounts display. You can choose to add another account right now or start using Quicken and add more accounts later.

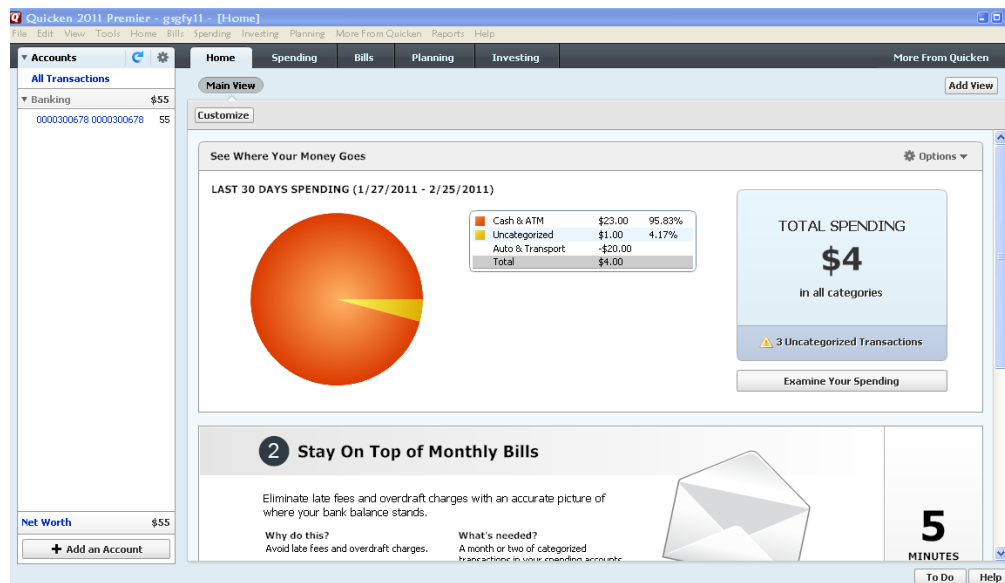
**Account Added**

**FirstMerit Bank N.A.**  
WEB: [www.firstmerit.com](http://www.firstmerit.com) | TEL: 1-888-554-4362

✔ 0000300678 0000300678  
Downloaded and categorized 81 days of transactions.

Add another account Finish

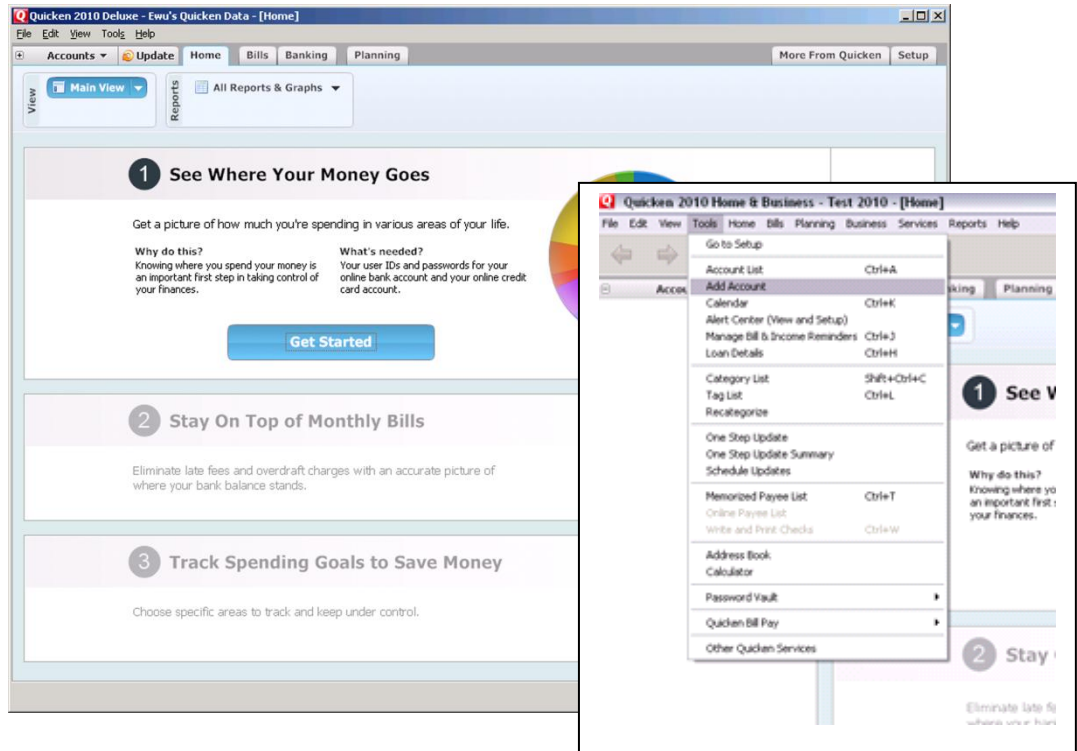
5. Quicken will download your transactions and automatically categorize them, so you can quickly see where your money is going.



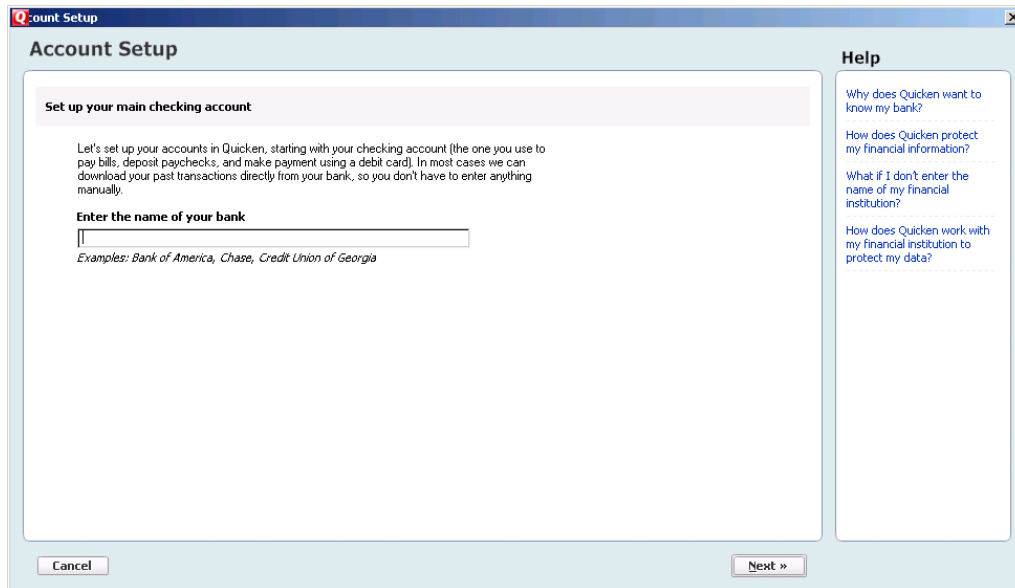
The pie chart on the homepage shows you where your money is going. To review your transactions, click on the account name in blue on the left side of the screen. To add another account, select the “Add Account” button on the bottom left of the screen. To update your accounts, just select the “Update” button at the top left of the screen to download transactions from your bank again.

## [CREATING A NEW QUICKEN ACCOUNT 2010](#)

6. To add a new account Launch Quicken 2010 → Click on the Tools drop down menu → then select the Add Account option.



7. On the Account Setup screen enter Simmons First → then click the Next button.



1. Enter your Simmons First Bank Anywhere ID and Simmons First Bank Anywhere password  
→ Click Next to continue.

The screenshot shows the 'Account Setup' window with the 'Log in to' section selected. It contains three input fields: 'User ID / User Name', 'password', and 'Reenter password'. A security warning box is present. The 'Next' button is highlighted, and a red arrow points from it to the 'User ID / User Name' field.

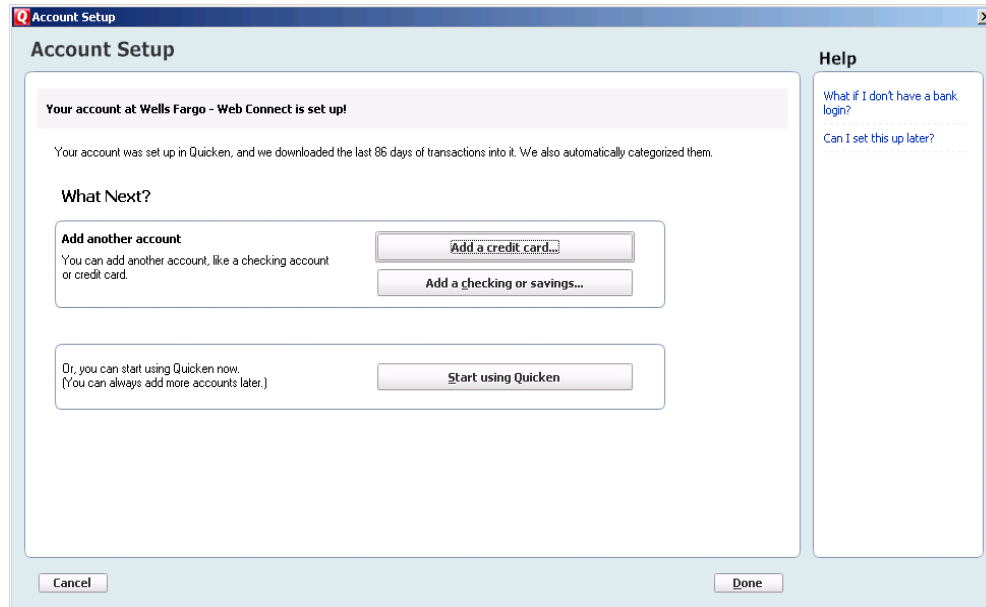
2. All downloadable Quicken accounts display. You can customize the Account Name (to use in Quicken: Enter account nickname) for each account by typing directly in the field.

The screenshot shows the 'Account Setup' window with the 'Add Your Accounts' section. A table lists found accounts with columns for 'Select', 'Account', 'Type', and 'Account nickname'. The first row is highlighted, and a callout box points to the 'Account nickname' field.

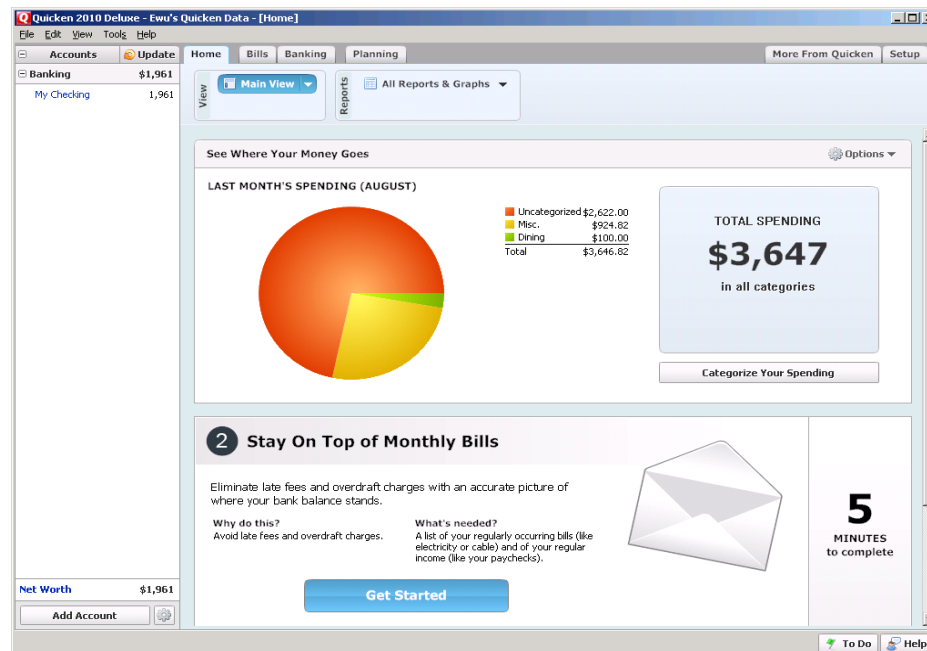
Select	Account	Type	Account nickname
<input checked="" type="checkbox"/>	CHECKING XXX-XXX	Checking	CHECKING XXXXXX

3. Confirm the accounts you wish to set up and/or customize Account Name → click Next

4. Quicken will download your transactions and automatically categorize them, so you can quickly see where your money is going. You can choose to add another account right now or start using Quicken and add more accounts later.



5. The pie chart on the homepage shows you where your money is going. To review your transactions, click on the account name in blue on the left side of the screen. To add another account, select the "Add Account" button on the bottom left of the screen. To update your accounts, just select the "Update" button at the top left of the screen to download transactions from your bank again.



## CREATING A NEW QUICKEN ACCOUNT 2009

1. Go to Online drop down Menu → Online Account Services Setup → Create New Quicken Account.
2. **Quicken Windows 2009 version only:** Select the account type you are creating → Click Next

When creating a Credit Card account choose Credit Card and Investing/Retirement for brokerage type accounts. For Money market accounts select either Checking or Savings.

3. If the account is held at the following institution Simmons First, select from the list provided.
4. After you have selected yes to connect to Simmons First through Quicken, click Next.
5. Enter your Simmons First Bank Anywhere ID and Simmons First Bank Anywhere password Click Next to continue.

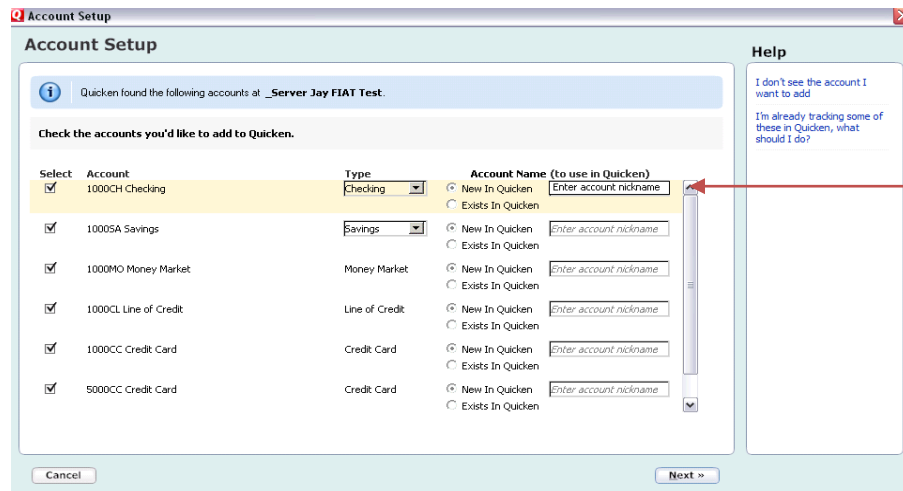
The screenshot shows the 'Account Setup' window in Quicken. The main area is titled 'Enter your Password for \_Server Jay FIAT Test'. It contains the following fields and text:

- Financial Institution: **\_Server Jay FIAT Test**
- User ID: **DEMOBK**
- Field: **\_Server Jay FIAT Test password** (with a password icon)
- Field: **Reenter password** (with a password icon)
- Security message: **Your password and data are secure. Find out how Quicken protects you.**
- Text: **\_Server Jay FIAT Test** requires that you enter the **account number** in order for Quicken to find your account.
- Field: **Account Number**

At the bottom of the window are three buttons: **Cancel**, **< Back**, and **Next >**. On the right side, there is a 'Help' panel with the following text:

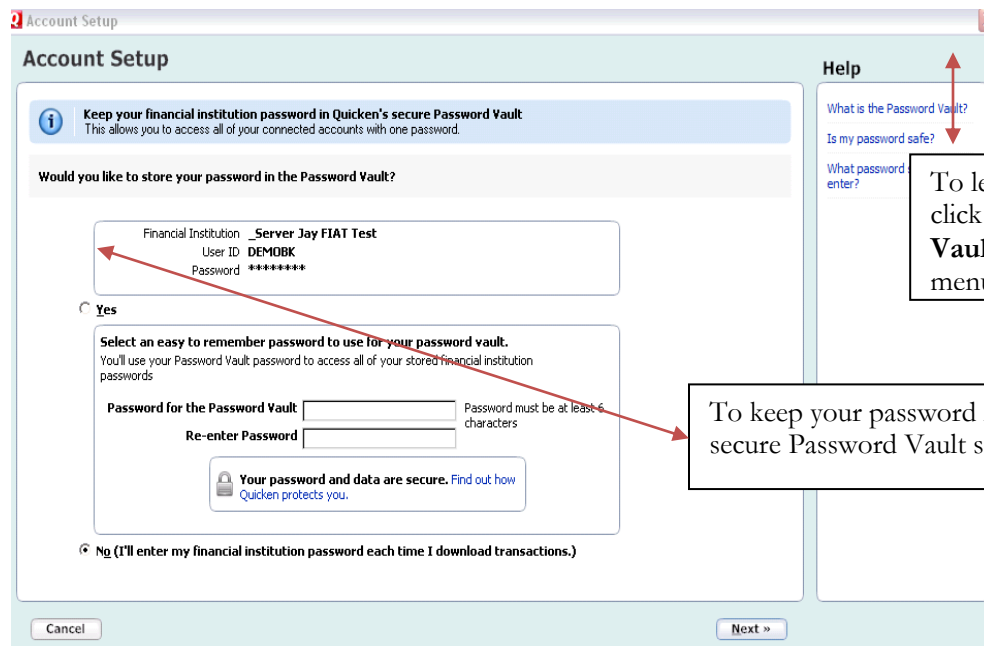
- Which password should I enter?
- Why can't I change my User ID?
- Is my password secure?
- How does Quicken work with my financial institution to protect my data?

- All downloadable Quicken accounts display. You can customize the Account Name (to use in Quicken: Enter account nickname) for each account by typing directly in the field.



To customize the Account Name in Quicken, enter account nickname

- Confirm the accounts you wish to set up and/or customize Account Name → click Next
- After the Quicken One Step update is completed, you will be prompted to store your password in the Password Vault. Select YES or NO to continue, → Click Next



To learn on the Password Vault, click on **What is the Password Vault** under the Help menu

To keep your password in Quicken's secure Password Vault select yes.

The screenshot shows the 'Account Setup' window in Quicken. At the top, there is a 'Setup Complete' notification. Below it, a section titled 'Summary of accounts added' contains a table with the following data:

Account	Type	Connection Type	Transactions Downloaded	Online Bill Pay
Jay's Checking 1	Checking	Direct Connect	9	Yes (Bank Billpay)
Jay's Savings 2	Savings	Direct Connect	2	Yes (Bank Billpay)
1000MO Money Market	Money Market	Direct Connect	2	Yes (Bank Billpay)
1000CL Line of Credit	Line of Credit	Direct Connect	0	-
1000CC Credit Card	Credit Card	Direct Connect	2	-
5000CC Credit Card	Credit Card	Direct Connect	0	-

Below the table, there are 'Next Steps' instructions. At the bottom right of the window is a 'Done' button. A red arrow points from a box labeled 'Summary of accounts added' to the table header.

9. After reviewing your Account Setup Summary page, Click Done

**YOU ARE SET UP AND READY TO USE QUICKEN**