

Getting Started with Quicken® 2007-2008 for Windows®



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

Before you can download your transactions with Quicken, you need Internet access, your customer ID, and your password. To complete Quicken account setup, you need to log into the Capital Bank Web site: www.capitalbanktx.com.

This guide includes the following sections:

- [Downloading the Latest Quicken Update](#)—Describes the steps to download free product updates as they become available for your version of Quicken.
- [Creating a New Quicken Account](#)—Explains how to use Express Setup to create a new Quicken account and download transactions.
- [Keeping your Quicken Accounts up to Date](#)—Explains how to download transactions on an ongoing basis.
- [Automating your Web Connect Downloads \(optional\)](#)—Explains how to activate the One Step Update feature.

For step-by-step help with an online task, choose **Help** menu → **Quicken Help**. In the **Type in the word(s) to search for:** prompt, enter **Download Transactions**.

Note to former QIF import users: Web Connect offers superior download capability. You will enjoy an easier and more accurate download, without having to import and find your file, worry about duplicates, or even manually launch Quicken! You can convert your existing Quicken account to download via Web Connect. If your financial institution offers multiple download options on the Web site, make sure to select **.QFX Web Connect**. Do not select the older **.QIF** file format.

DOWNLOADING THE LATEST QUICKEN UPDATE



1. Click the **Update** icon on the Quicken toolbar.
2. Uncheck all boxes, and click **Update Now** in the **One Step Update Settings** dialog.
3. If an update is available, then Quicken provides a description of the update and brief instructions for downloading the update.
4. When the update completes, restart Quicken.

CREATING A NEW QUICKEN ACCOUNT



1. Open a Web browser and log into the Capital Bank Web site: www.capitalbanktx.com. Log into your internet banking and click on the account that you want to export transaction history into Quicken. Next, place your mouse cursor over “Transactions” to view the “Transactions” menu and click on “Export Transactions.” Select the statement cycle or date range you wish to export into Quicken. Next, select the export format “Intuit Quicken (2005 or later) [.QFX]”.
2. When you click **Export**, your browser may prompt you to open or save files. If this prompt appears, click **Open** and follow the on-screen instructions.
3. To set up a new account in Quicken, click **Create a new Quicken account**, and type a name for this account. Click **Continue**.

To select an account that you have been using to manually enter transactions, click **Use an existing Quicken account**, and then select the existing account from the drop-down list. Click **Continue**.

Quicken 2007 Premier - 2007 - [Quicken Home]

You are downloading transactions for the following account:

- Financial Institution : Web Connect
- Account type : Checking
- Account number : TESTIMR2

If you have set up an account in Quicken to track this account, choose "Use an existing Quicken account" and then select it from the list. Otherwise, choose "Create a new Quicken account" and Quicken will add one for you.

Use an existing Quicken account:

Create a new Quicken account:

Continue Cancel Help

To use an existing account, click and select the account

To create a new account, click and type the account name here.

4. If the **Rename Your Payees** window appears, take the desired action:
 - To accept the default name change of one or more payees, check the box next to each payee name.
 - To change the payee name to a name other than the default, check the box next to the payee name, click **Edit**, and follow the on-screen instructions.
 - To leave a payee name unchanged, do not check the box next to it.

To apply your payee name changes, click **Apply Settings**.

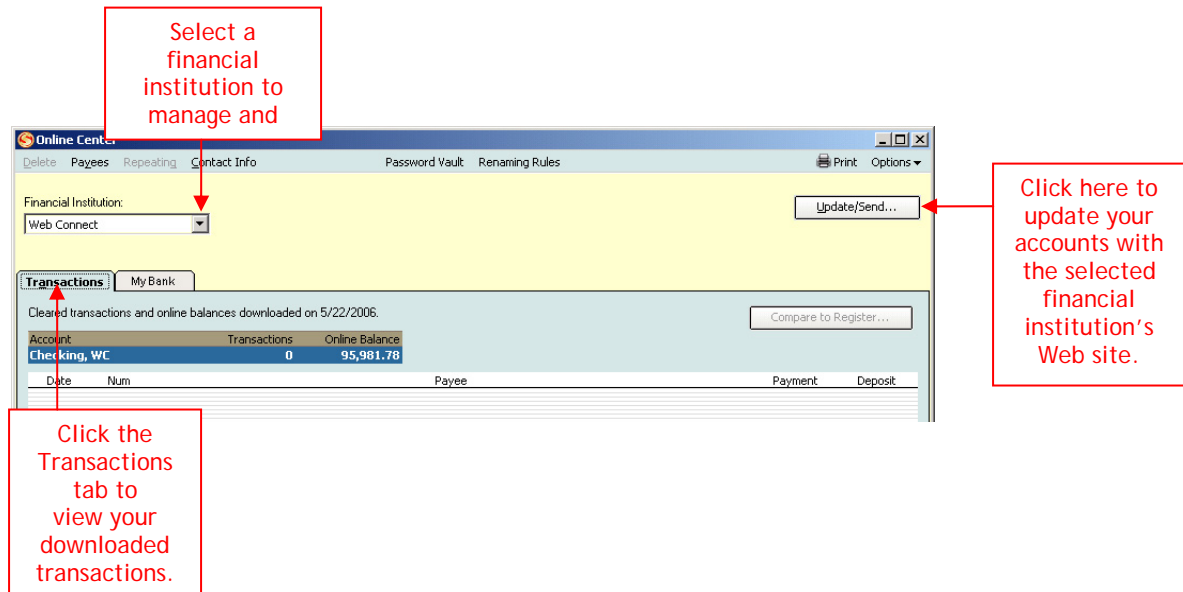
Or, to exit this window without making changes, click **Cancel**.

5. Quicken confirms that your account setup and download were successful in the **One Step Update Summary**. Click **Close**.

KEEPING YOUR QUICKEN ACCOUNTS UP TO DATE

The Online Center provides an easy way to download transactions into the accounts that you have activated for online account services.

To open the Online Center, choose Online menu → Online Center.



AUTOMATING YOUR WEB CONNECT DOWNLOADS (OPTIONAL)

Express Web Connect provides the option of activating the One Step Update feature, which automates the downloading of Web Connect data. To activate the One Step Update feature, take either of these actions:

- If you see the **Activate One Step Update** prompt during the Web Connect download process, click **Yes**, and then click **Activate**.
- From Quicken, choose Online menu → **One Step Update**. In the dialog that displays, choose **Activate One Step Update** link next to Capital Bank.
- Quicken confirms that your account setup and download were successful in the **One Step Update Summary**. Click **Close**.

Once activated, you can choose Online menu → **One Step Update** to perform downloads.

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

If you have any questions regarding these instructions, you may contact us at (713) 675-2341. A customer service representative will be available to assist you from 9:00 A.M. to 4:00 P.M. Monday – Thursday and 9:00 A.M. to 6:00 PM on Friday. You may also visit the Capital Bank Web site at www.capitalbanktx.com or refer to: <http://www.intuit.com/support/quicken>.