NASA FEDERAL CREDIT UNION

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 your **NASA FCU eBranch Online Banking login credentials (account number and 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.

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.

   If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.
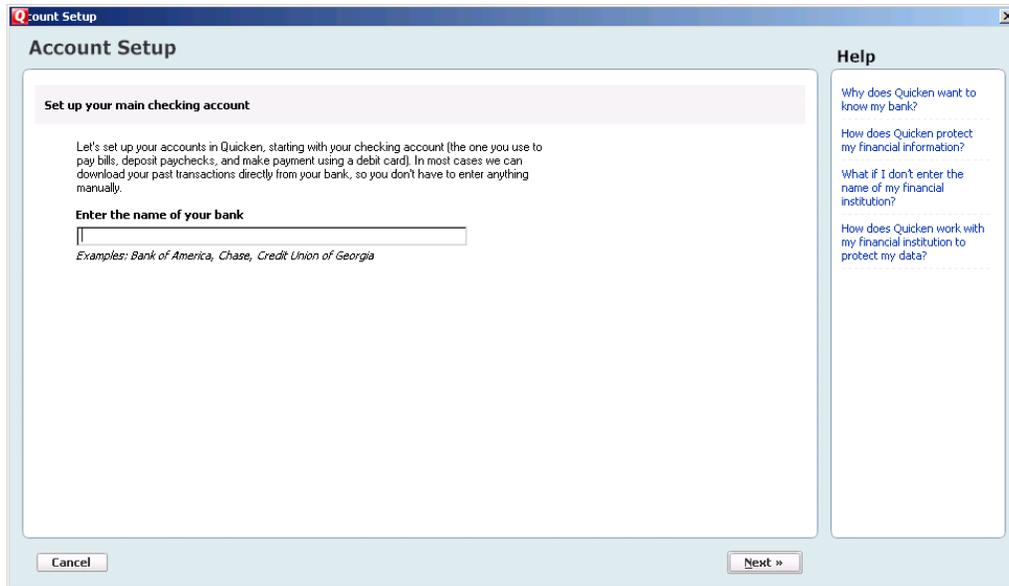
3. When the update is completed, close Quicken. Reopen Quicken.
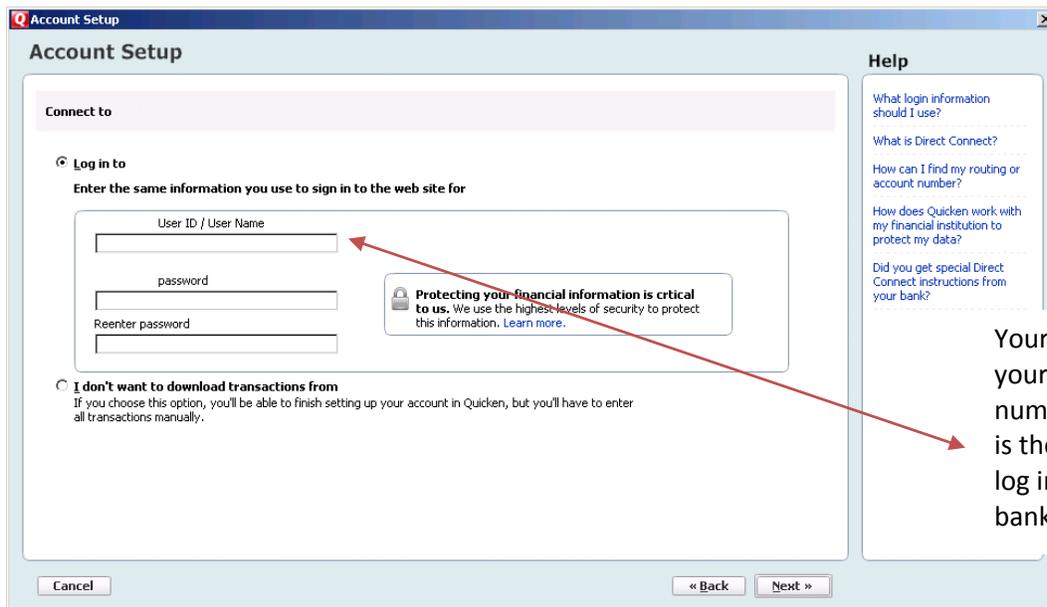
CREATING A NEW QUICKEN ACCOUNT 2010/2011

1. To add a new account Launch Quicken 2010 → Click on the Tools drop down menu → then select the Add Account option.
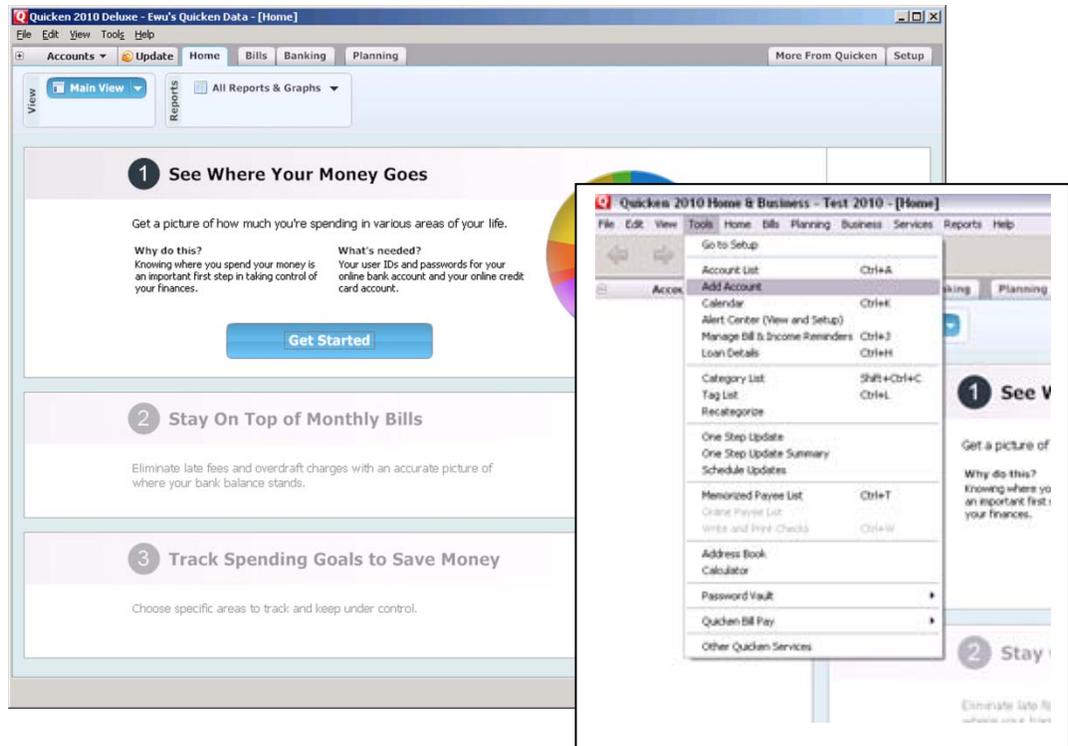
2. On the Account Setup screen enter **NASA FCU – Direct Connect** → then click the Next button.

Account Setup

Set up your main checking account

Let's set up your accounts in Quicken, starting with your checking account (the one you use to pay bills, deposit paychecks, and make payment using a debit card). In most cases we can download your past transactions directly from your bank, so you don't have to enter anything manually.

Enter the name of your bank

Examples: Bank of America, Chase, Credit Union of Georgia

Help

Why does Quicken want to know my bank?

How does Quicken protect my financial information?

What if I don't enter the name of my financial institution?

How does Quicken work with my financial institution to protect my data?

Cancel   Next »

3. Enter your customer ID (NASA FCU account number) and password (this is the same information that you use to login to eBranch online banking) → Click Next to continue.

Account Setup

Connect to

● **Log in to**

Enter the same information you use to sign in to the web site for

User ID / User Name

password

Reenter password

🔒 **Protecting your financial information is crtical to us.** We use the highest levels of security to protect this information. Learn more.

○ **I don't want to download transactions from**
If you choose this option, you'll be able to finish setting up your account in Quicken, but you'll have to enter all transactions manually.

Help

What login information should I use?

What is Direct Connect?

How can I find my routing or account number?

How does Quicken work with my financial institution to protect my data?

Did you get special Direct Connect instructions from your bank?

Cancel   « Back   Next »

Your User ID/User Name is your NASA FCU account number and your Password is the password you use to log in to eBranch online banking

4. 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.
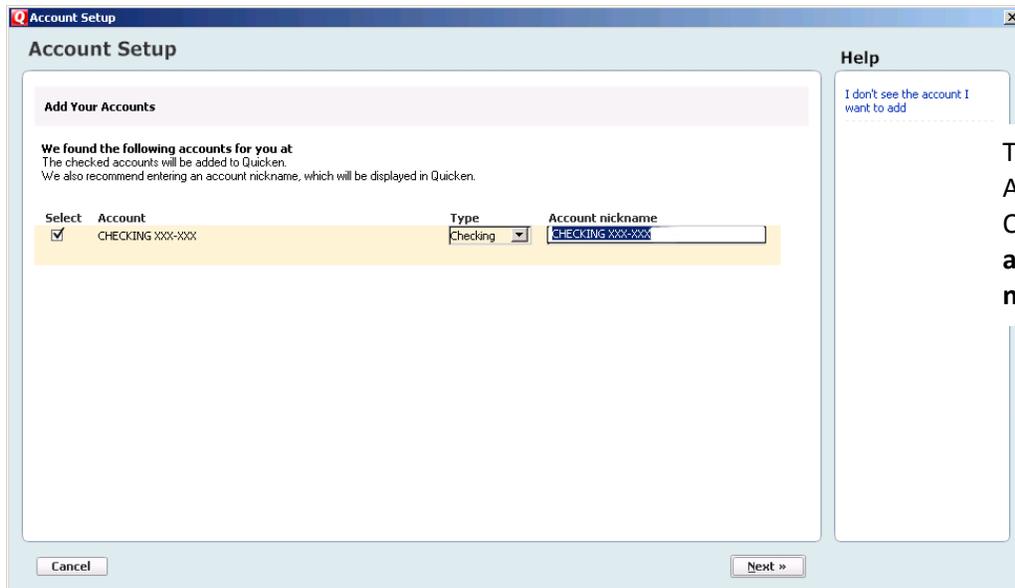

To customize the Account Name in Quicken, **enter account nickname**

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

6. 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.
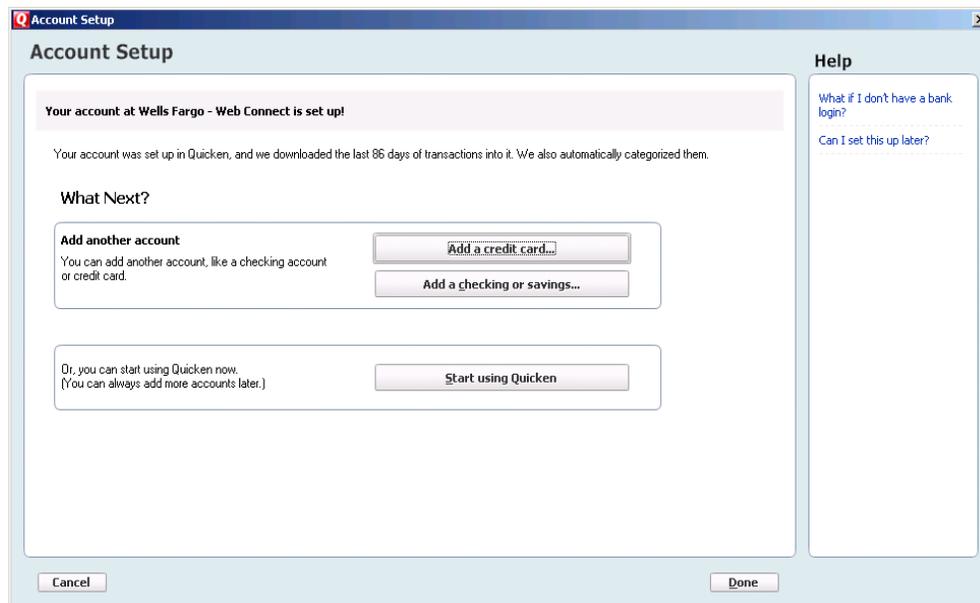
7. The pie chart on the homepage shows you where your money is going. To review your transactions, click on the account name in blue on the left side of the screen. To add another account, select the "Add Account" button on the bottom left of the screen. To update your accounts, just select the "Update" button at the top left of the screen to download transactions from your bank again.
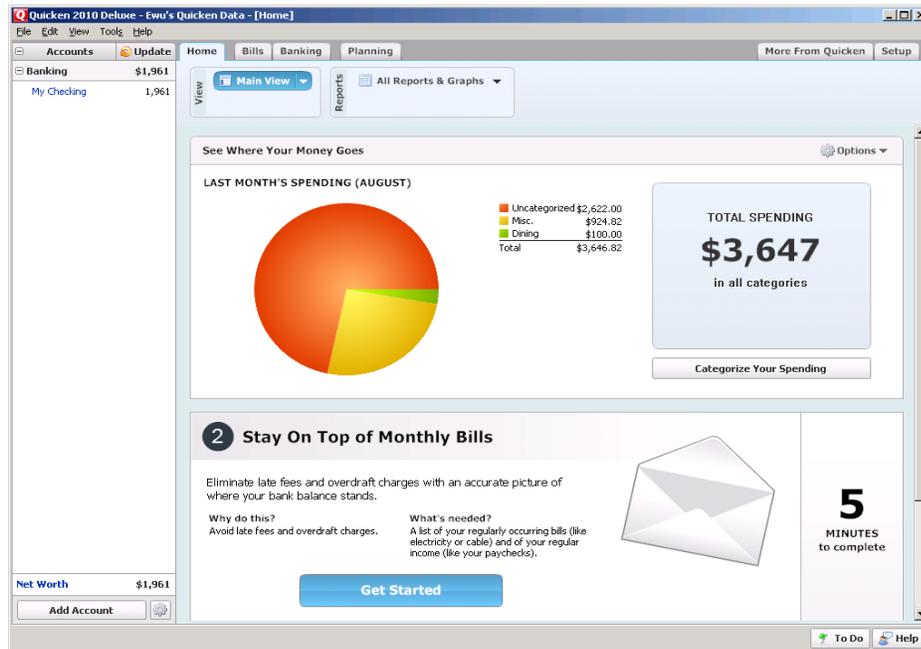
CREATING A NEW QUICKEN ACCOUNT 2009

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 NASA FCU **s**elect from the list provided.

4. After you have selected yes to connect to NASA FCU – Direct Connect through Quicken, click Next.

5. Enter your customer ID (NASA FCU account number) and password (eBranch online banking password). Click Next to continue.

Your User ID/User Name is your NASA FCU account number and your Password is the password you use to log in to eBranch online banking

6. 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**

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

8. 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
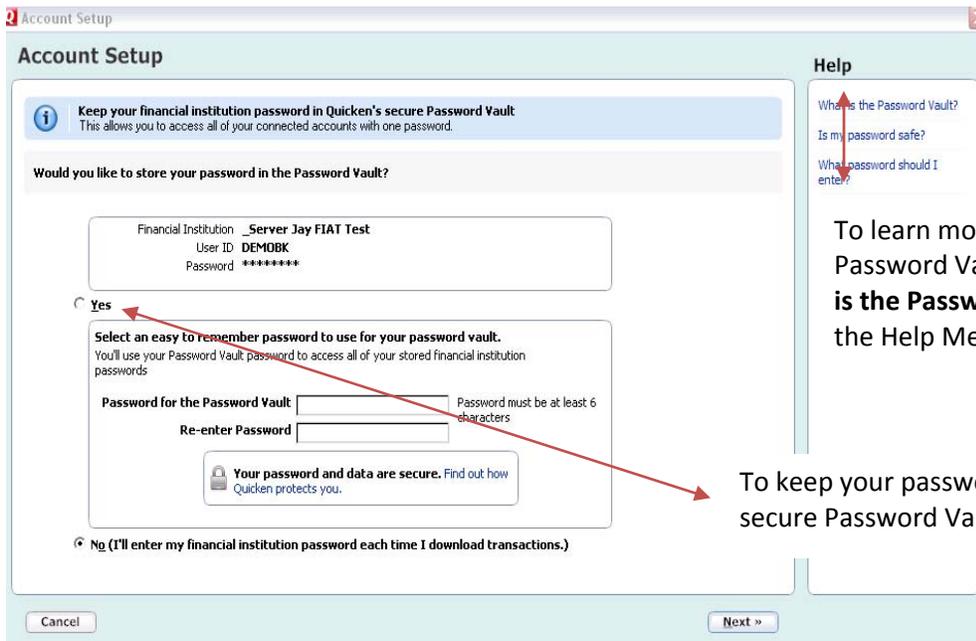
To learn more about the Password Vault, click on **What is the Password Vault** under the Help Menu

To keep your password in Quicken's secure Password Vault select yes.
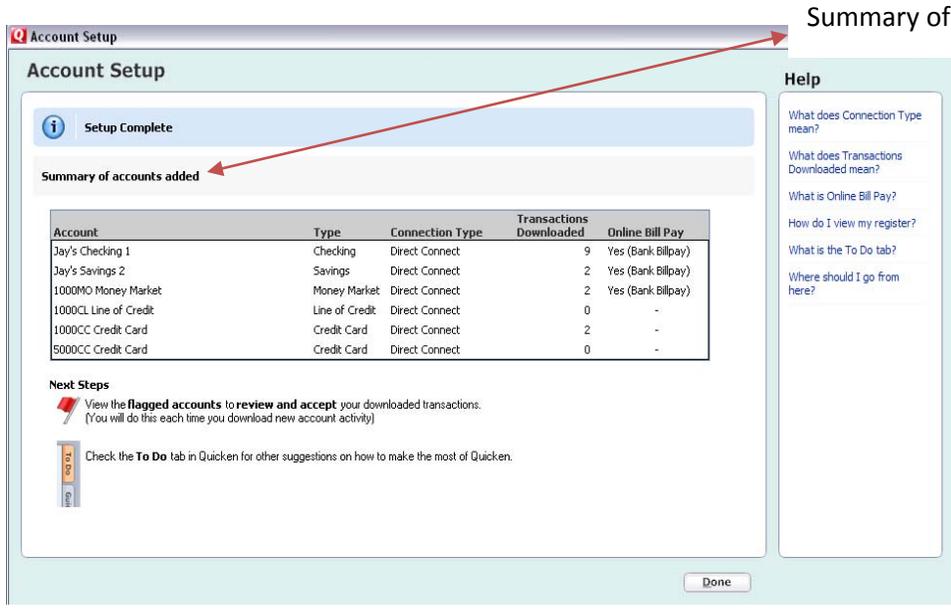
Summary of accounts added

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

YOU ARE SET UP AND READY TO USE QUICKEN