

Quicken 2019 for Windows Getting Started Guide

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Quicken 2019 for Windows Getting Started Guide

Thank you for choosing Quicken!

About This Guide

This guide helps you get started with Quicken 2019 as quickly as possible. You'll learn:

- What you will need to get started
- How to set up an account for online banking (Direct Connect)
- How to set up an account for online banking (Web Connect & Express Web Connect)
- How to update an account setup for online banking
- How to set up Bill Pay (Direct Connect-only)

New in Quicken 2019 for Windows

Quicken 2019 maintains the same online banking connectivity features, along with some new features not found on previous versions.

Bills

- Access to more than 11,000 online billers with an improved bills dashboard.
- Email bill alerts.
- Pay your bills in Quicken for free with Quicken Bill Pay (Premier and above).
- Link your bills with top biller sites to automatically update balances and due dates every month in Quicken. No need to visit bank or biller websites to keep track of your bills.

Product Enhancements

- New Vantage 3.0 credit score.
- Updated 2019 tax rates and standard mileage rates.
- Apply One Step Update settings without performing an update.

Investments

- Security dropdown now allows you to search by name or symbol.
- Archive Investment Transactions Feature: Improve performance of investment registers.
- Richer investment performance with Buy & Hold comparison (Premier and up only).

Before You Connect

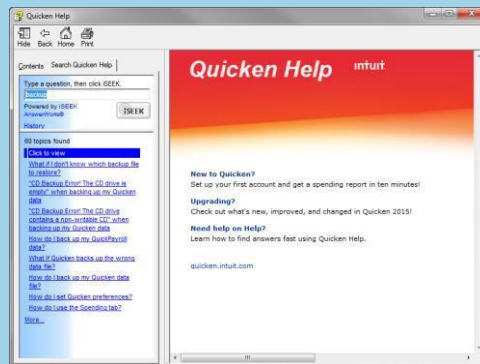
Before you set Quicken to download transactions, you may need to contact American Bank for the following information:

- Customer ID
- Password

For Quicken Web Connect/Express Web Connect accounts, use the same customer ID and password as the American Bank online banking. For Direct Connect, they may be different. Please contact American Bank to verify your Direct Connect login information.

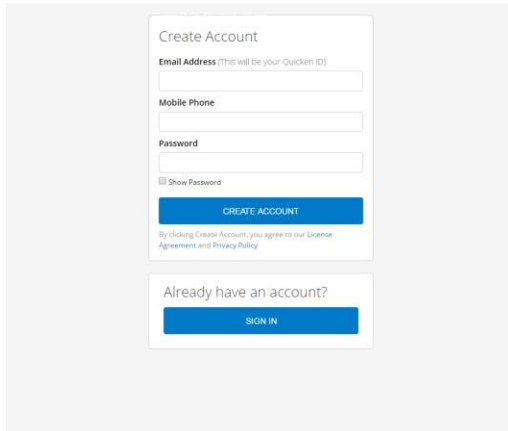
IMPORTANT:

We recommend that you back up your Quicken Data File before setting up online banking accounts for the first time. Choose **Help > Quicken Help** and search for **Back Up** for backup instructions.



Register a Quicken Data File With a Quicken ID

When you set up an account for online banking, Quicken requires you to link your Quicken data file to a Quicken ID. If you don't currently have a Quicken ID, you will need to create one.



The screenshot shows a web form titled "Create Account". It contains the following fields and elements:

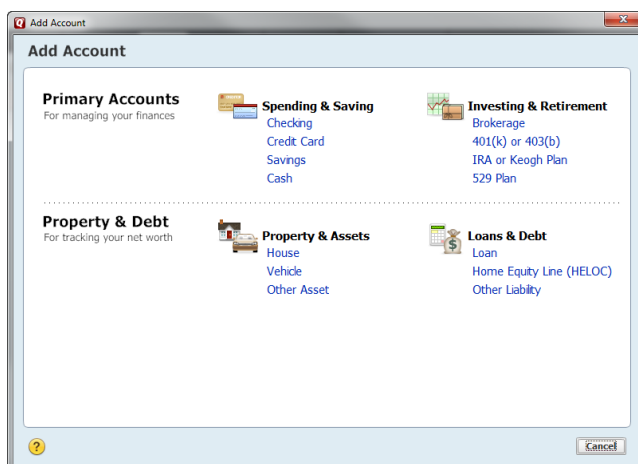
- Email Address (this will be your Quicken ID)**: A text input field.
- Mobile Phone**: A text input field.
- Password**: A text input field.
- Show Password**: A checkbox to toggle password visibility.
- CREATE ACCOUNT**: A blue button.
- By clicking Create Account, you agree to our [License Agreement and Privacy Policy](#).
- Already have an account?**: A text label.
- SIGN IN**: A blue button.

Fill in the information to set up your Quicken ID and link your data file.

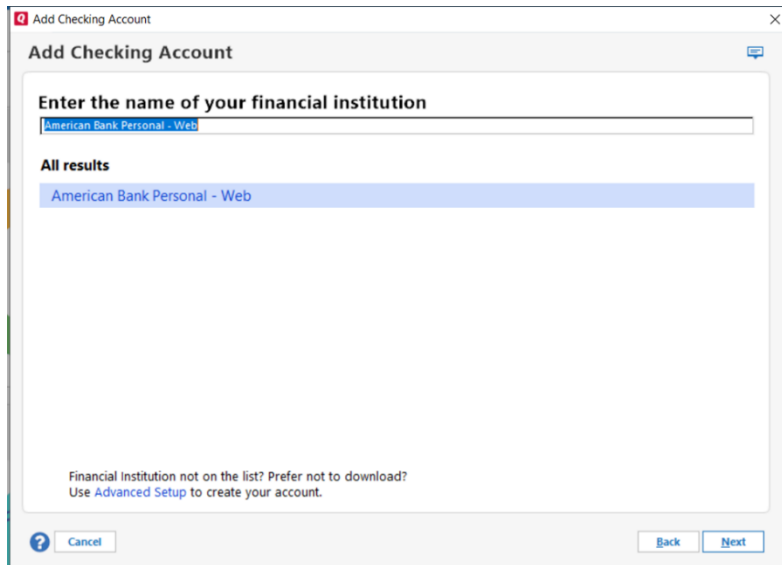
If you already have a Quicken ID, click **SIGN IN** under "Already have an account?" and sign in.

Set Up an Account for Online Banking (Direct Connect)

1. Choose **Tools > Add Account**.
2. Click the type of account you want to set up.



3. After you choose the type of account you want to add, you will see the financial institution selection screen. Search for and select "American Bank Personal - Web" and then click **Next**.



IMPORTANT: Be sure to select the correct listing for American Bank, because some financial institutions may appear more than once. If you have any questions about which listing to choose for Direct Connect, please contact American Bank.

4. Quicken will now display a login screen: type your Direct Connect credentials and follow the prompts to add your accounts to Quicken 2019.

Set Up an Account for Online Banking (Web Connect)

1. Log in to American Bank's online banking.
2. Download your transactions according to American Bank's instructions.
3. If you are given a choice for your download format, choose "Quicken Web Connect (*.QFX)" and save the file to your computer.

NOTE: These instructions assume you will save the download to your computer. If you "open" it instead, your web browser should open Quicken and begin to import the transactions. If you plan to open the file directly, we recommend that you have your Quicken data file open in Quicken 2019 before you begin Step 2.

4. Open Quicken, then choose **File > File Import > Web Connect File**. You will see an import dialog.
5. Navigate to and select the file you downloaded in Step 2, then click **Open**.
6. Click **Link an Existing Account** if you have an appropriate account in the account list. If you don't have an account yet, click **Create a new account** and enter a nickname for that account.
7. Click **Import**.
8. Click **OK** to confirm and finish.

Set Up an Account for Online Banking (Express Web Connect)

1. Choose **Tools > Add Account**.
2. Select the type of account you want to set up.
3. After you select the name of account you want to add, you will see the financial institution selection screen. Type "American Bank" to filter the list.
4. When you see American Bank's name in the filter results, click it and click **Next**.
5. Quicken will now display a login screen: type the credentials you use to log in to American Bank's online banking and follow the prompts to add your accounts to Quicken 2019.

NOTE: During the Express Web Connect setup, you might be asked to enter your Multi-Factor Authentication information. This could be a series of security questions, a one-time passcode, etc.

Updating Accounts: The One Step Update

After an account has been set up for online banking, you can use One Step Update to update information:

1. Choose **Tools > One Step Update**.
2. Enter the necessary information for the listed accounts (such as passwords or user ID) and click **Update Now**.
3. Follow the instructions to update your accounts.

Set Up Bill Pay (Direct Connect)

Some financial institutions offer Direct Connect subscribers the ability to send payments directly from within Quicken. For American Bank, this feature is turned on during the Direct Connect account setup.

NOTE: Contact American Bank if you have any questions about Bill Pay enrollment, processes and capabilities.

Adding an Online Payee

Sending online payments with Quicken is a fast and easy way to pay your bills. Just add the payment to the Online Payee List once; all Quicken accounts share this list.

1. Choose **Tools > Online Center**.
2. Choose "American Bank" from the drop-down list.
3. Select the Payments tab, type your payee's name in the Payee field, and press the **TAB** key.
4. In the Set Up Online Payee window, enter your payee's contact and account information, then click **OK**.
5. Review the information on the Confirm Online Payee Information dialog, then click **Accept** to continue (if you need to edit the information, click **Cancel** and make any changes).

Creating an Online Payment

After you have added your online payees, you are ready to create an online bill payment.

1. Choose **Tools > Online Center**.
2. Choose "American Bank" from the drop-down list.
3. Select the Payments tab and type your payee's name in the Payee field.
4. Fill in the remaining fields for the payment that you wish to make (payment amount, processing or delivery date, category, and memo) then click **Enter**.
5. Click **Update/Send...** to send your payment.