



Getting Started with Transaction Download in Quicken 2005-2006

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

This guide includes the following sections:

Creating a New Quicken Account, page 2—Explains how to use Express Setup to create a new Quicken account for downloading transactions.

Keeping your Quicken Accounts Up-to-Date, page 3—Explains how to download transactions with accounts that you have activated for online account services.

Information You'll Need to Get Started:

First ensure you have set up your Personal Finance product. To download your transactions with Quicken, you must have Internet access and Online Banking. You must have accessed your online banking within the last 180 days. In addition, to complete setting up your Quicken accounts for transaction download, you will need to call WCB Customer Support Department at 800-895-3345.

To initiate the process you will need the following additional information

- User ID (Social Security Number or Tax Identification Number)
- Account number(s)
- PIN (Provided by WCB Customer Support)
- West Coast Bank routing number 123203218

When you have received the necessary information, this guide will show you how to setup and download your accounts. For step-by-step help with an online task, choose **Learn About Downloading Transactions** from the Quicken **Help** menu.

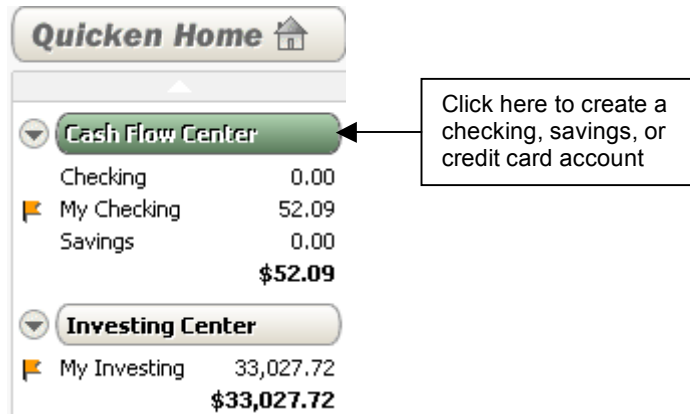
Important: First, Download the latest program updates!



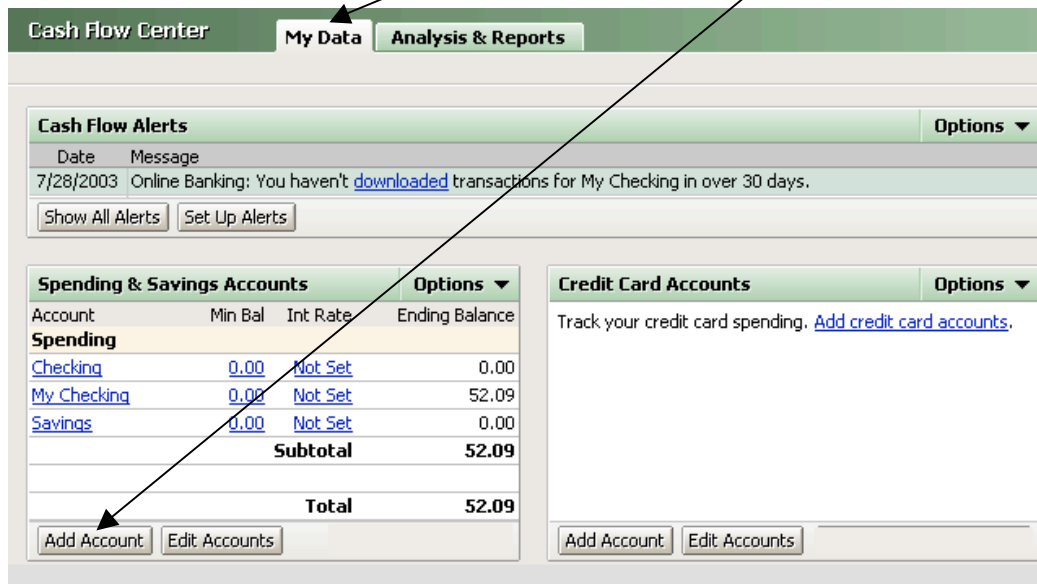
To get the latest directory of participating financial institutions and program updates click **Update** on your Quicken toolbar. In the dialog, click **Update Now**, Quicken will automatically check for available updates. When this download process is complete, **exit** and **restart** Quicken.

Creating a New Quicken Account (Using Express Setup)

Step 1 From the Account Bar, click **Cash Flow Center**.



Step 2 In the Cash Flow Center, click the **My Data** tab and then click **Add Account**.



Step 3 Enter West Coast Bank in the financial institution selection dialog and click **Next**.

Step 4 During the next 3 dialogs you will,
1 - select the account type (e.g. checking, savings)
2 - name the account
3 - choose **Online** setup

Important Notes: West Coast Bank Routing number is 123203218

Step 5 The next dialog will ask for your Customer ID and PIN, enter this information. If you're unsure about which ID/PIN to use, see the information under "Need a Customer ID and PIN?" to the right in this dialog. Read the notes below, and then follow the onscreen instructions to complete online setup.

Note: PIN provided by WCB Customer Support @ 800-895-3345

Keeping your Quicken Accounts Up-to-Date

Step 1 To download transactions from your account register, click **Download Transactions** located at the bottom of your account register.

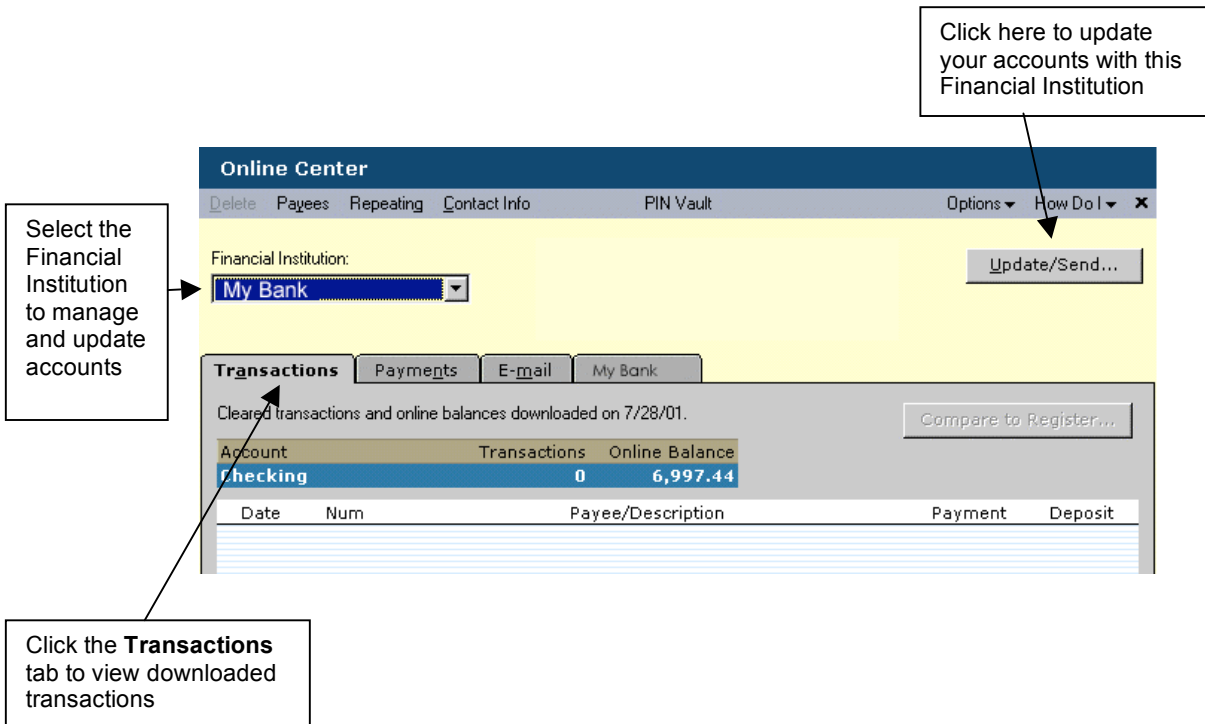
Step 2 Follow the on-screen instructions to complete downloading transactions.



Updating Accounts from the Online Center

The **Online Center** also lets you easily download transactions from the accounts that you have activated for online account services.

Easy Access: From the **Online** menu, select **Online Center**.



If you have any questions regarding these instructions, you may contact WCB Customer Support at 800-895-3345. You may also visit the West Coast Bank Web site at [wcb.com](http://www.wcb.com) or refer to: <http://www.intuit.com/support/quicken>.