

# Do you have your Quicken customer ID and password?

## No, I haven't received my password

Quicken will take you to the financial institution's website. You can either apply online for a password or find contact information to call and sign up for one.

The new account will be added with an opening balance of \$0.00, as of today's date. Quicken will remind you in a predetermined number of days to continue the setup process with your new password.

## Yes, I have my password

### If your financial institution is a Direct Connect partner

For **Direct Connect** accounts, your Quicken password may or may not be the same as the password to your financial institution's website. If you have your Quicken password, Quicken will update transactions for you right now.

### If your financial institution is a Web Connect partner

For Web Connect accounts, your Quicken password is the same as the password to your financial institution's website. If you have your Quicken password, you can go now to the financial institution's website, where you can log in and begin to update transactions.

1. Log in to the website.
2. Navigate to a page with a label like **View History** or **Export History**.
3. Choose an account if necessary.
4. Click **Download** into Quicken.
  - If you're given a choice between downloading an OFX, QFX, or QIF file, choose either OFX or QFX.
  - If Windows gives you a choice to open the file or save it to your computer hard drive, choose Open.
  - If your computer has never opened a QFX file before, you may also be prompted to identify a software program with which open the file. Choose **Quicken**.

## I'd like to add my accounts manually

Quicken will walk you through the process of setting up the account and adding transactions manually. Follow the on-screen instructions.