



Quicken Online Banking Setup

The following steps will guide you through setting up Quicken to connect to your Citizens Bank, N.A. account. After the connection is setup, transactions on your Citizens Bank, N.A. account will automatically show up when viewing your account in Quicken without further setup or download of transactions.

(This example is for Quicken Home and Business 2009 but will be similar in other versions)

- ❖ You will need the following:
 - Supported version of Quicken (refer to info below)
 - Your Citizens Bank, N.A. online banking login information
 - Access ID
 - Password

*******Supported Versions of Quicken info*******

http://quicken.custhelp.com/cgi-bin/quicken.cfg/php/enduser/std_adp.php?p_faqid=3874&p_created=1131741479

Quicken Personal Financial Software discontinuation dates

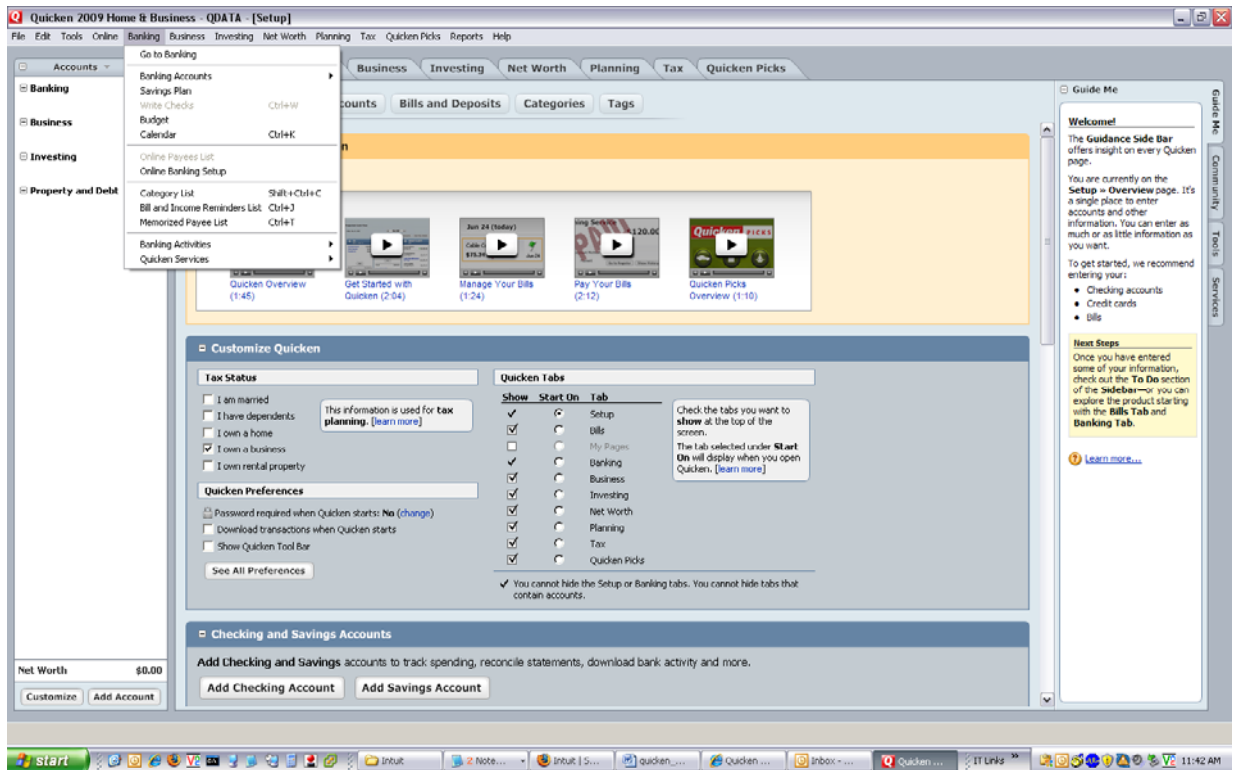
Product	Discontinuation Date
Quicken 98	April 20, 2004
Quicken 99	April 20, 2004
Quicken 2000	May 18, 2004
Quicken 2001	April 19, 2005
Quicken 2002	April 19, 2005
Quicken 2003	April 25, 2006
Quicken 2004	April 30, 2007
Quicken 2005	April 30, 2008
Quicken 2006	April 30, 2009
Quicken 2007	April 30, 2010

Quicken says:

“I would like to inform you that in an ongoing effort to provide reliable high-quality products and services, Intuit periodically retires (also known as “discontinuation” and formerly as “sunsetting”) older versions of Quicken, thereby discontinuing online services and live technical support for these versions. Under this policy, the most current version of Quicken (currently Quicken 2009), plus the prior two versions, will be supported, subject to certain exceptions. Discontinuing older versions of Quicken enables Intuit to focus resources on enhancing its products and providing support for more current versions, which are used by most Quicken customers”

After installing Quicken onto your computer, start the program.

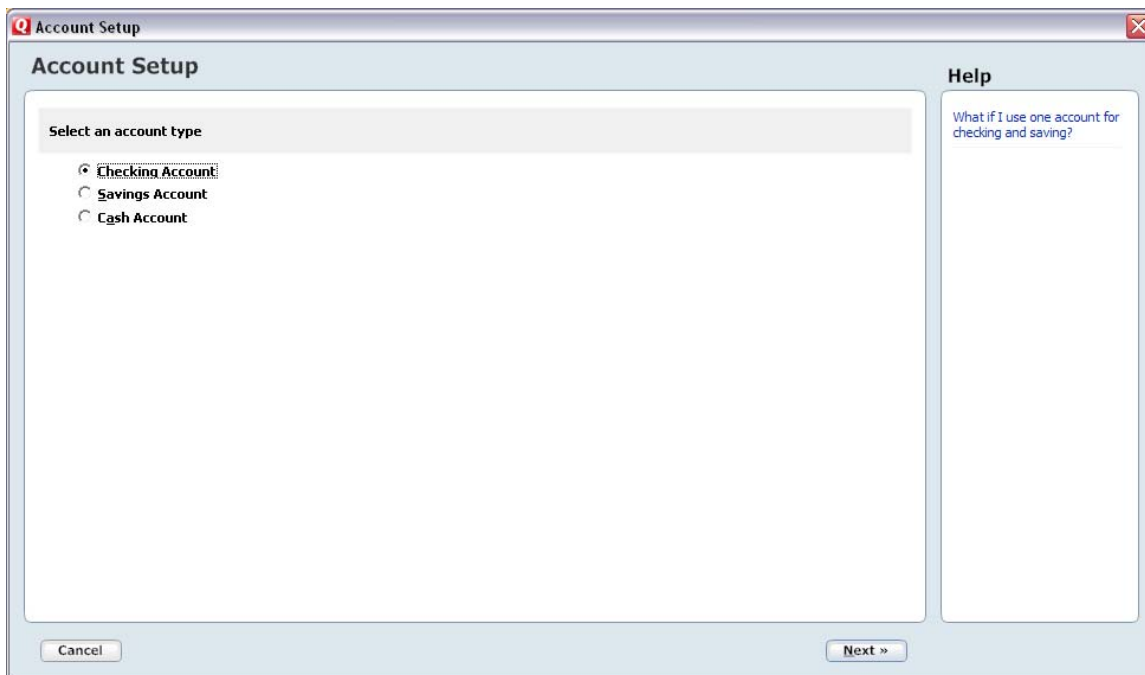
Go to Banking, then Online Banking Setup (shown in picture below)



Click 'Next' button on the Online Account setup window that pops up.



Select the account type on the Account Setup window, then click next.



Type 'Citizens Bank, N.A.' into the blank provided (must be typed exactly like that). When Citizens Bank, N.A. appears on the drop down, click on it.

Account Setup

What is the financial institution for this account?

The account is held at the following institution

Select a letter or phrase to find your financial institution

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Bank of ... First ... 1st ...

Enter the name of your financial institution or select from a list by clicking the buttons above.

- Citizens Bank, N.A. Fort Scott, KS
- Citizens Bank, Batesville, AR
- Citizens Bank, Mount Vernon, KY
- Citizens Bank, N.A. Fort Scott, KS

Cancel << Back Next >>

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?

Click 'Next'.

Account Setup

i Transaction download available!
This allows you to get information from your bank without leaving Quicken.

Do you want to download your balance and account activity directly from your bank using Quicken?

Yes, connect to Citizens Bank, N.A. Fort Scott, KS through Quicken (recommended option)

Your password and data are secure. Find out how Quicken protects you.

No, I'll visit my bank web site to download transactions into Quicken myself

No, I'll manually enter my transactions into Quicken

Cancel << Back Next >>

Help

- I am not sure what to select
- What does automatic download mean?
- Learn more about downloading activity from your account
- Can you explain these options?
- How does Quicken protect my financial information?
- How does Quicken work with my financial institution to protect my data?

Type in your Citizens Bank, N.A. User ID (Access ID) and password into the blanks provided. This must be the same login info you use for your Citizens Bank, N.A. online banking.

Account Setup

Transaction download available!
This allows you to get information from your bank without leaving Quicken.

Log in to enable transaction download in Quicken

Log in using my Citizens Bank, N.A. Fort Scott, KS ID and Password

Citizens Bank, N.A. Fort Scott, KS User ID / username
myuserid

Citizens Bank, N.A. Fort Scott, KS password

Reenter password

Your password and data are secure. Find out how Quicken protects you.

I do not have a Citizens Bank, N.A. Fort Scott, KS user name and password
(I have never logged in to my Citizens Bank, N.A. Fort Scott, KS web site)

Cancel << Back Next >>

Help

What login information should I use?

What does automatic download mean?

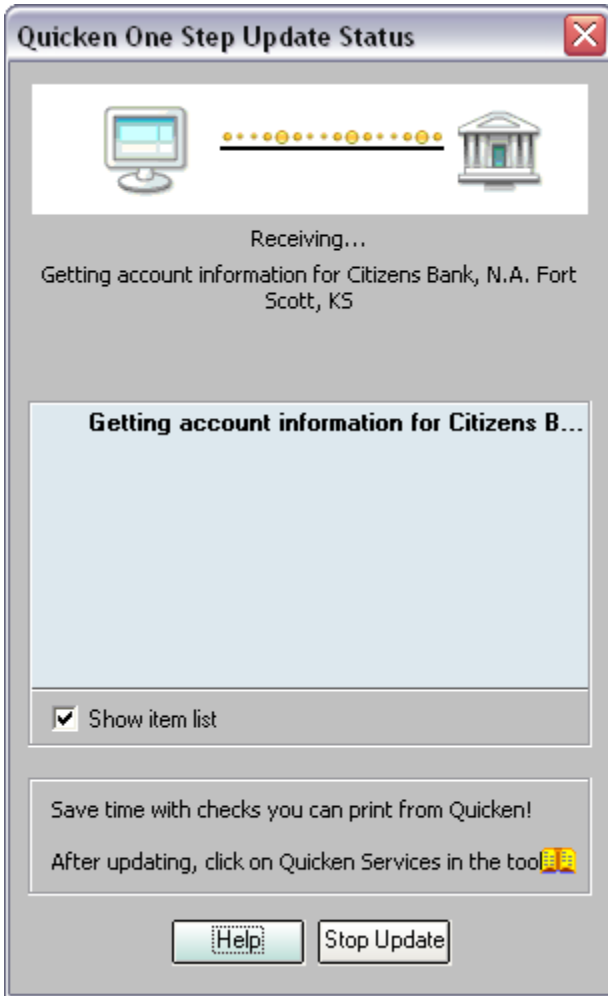
How does Quicken work with my financial institution to protect my data?

The following windows will appear; wait until they finish updating.

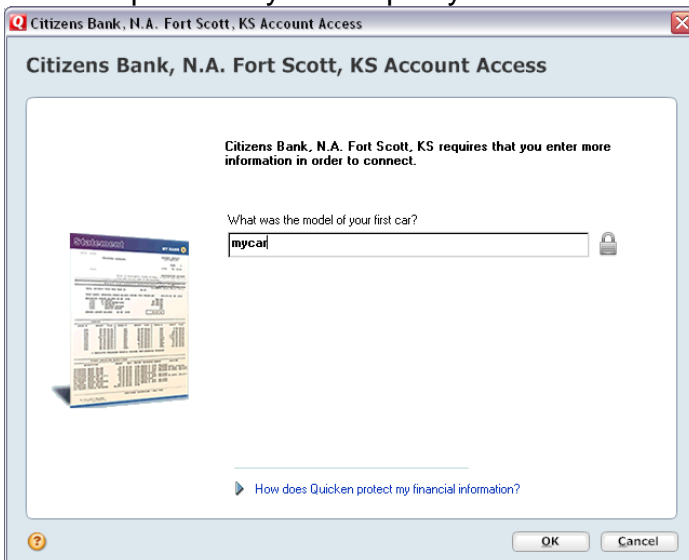
Connection Status at Citizens Bank, N.A. Fort Scott, KS

Updating financial institution information: Contacting Internet...

Stop Update



Type in the answer to the provided security question, then click 'OK'. This will be one the questions you setup in your Citizens Bank, N.A. online banking.



Type in what you would like to nickname your account in Quicken, then click 'Next'. This is only for your reference.

The screenshot shows the 'Account Setup' window in Quicken. At the top, it says 'Quicken found the following accounts at Citizens Bank, N.A. Fort Scott, KS.' Below this, there is a section titled 'Check the accounts you'd like to add to Quicken.' A table lists the account details:

Select	Account	Type	Used primarily for	Account Name (to use in Quicken)
<input checked="" type="checkbox"/>	SMART MONEY CHECKING 63...	Checking	Personal	<input type="radio"/> New In Quicken <input type="text" value="MyAcctName"/> <input type="radio"/> Exists In Quicken

At the bottom of the window are 'Cancel' and 'Next >' buttons. On the right side, there is a 'Help' panel with the following text: 'I don't see the account I want to add', 'I'm already tracking some of these in Quicken, what should I do?' and 'What is the Password Vault? Is my password safe? What password should I enter?'.

Under Account Setup, you will need to choose whether or not to store your password in the password vault. 'No' is the most secure option and our recommended choice.

The screenshot shows the 'Account Setup' window in Quicken, focusing on the password vault options. It features a section titled 'Keep your financial institution password in Quicken's secure Password Vault' with the subtext 'This allows you to access all of your connected accounts with one password.' Below this, it asks 'Would you like to store your password in the Password Vault?' and provides a summary of the account details: 'Financial Institution: Citizens Bank, N.A. Fort Scott, User ID: [redacted], Password: *'. There are two radio button options: 'Yes' and 'No (I'll enter my financial institution password each time I download transactions.)'. The 'No' option is selected. Below the 'Yes' option, there is a field for 'Password for the Password Vault' and a message: 'Your password and data are secure. Find out how Quicken protects you.' At the bottom of the window are 'Cancel' and 'Next >' buttons. The 'Help' panel on the right contains the same text as in the previous screenshot.

Your Quicken online banking setup is now complete, click done.

