

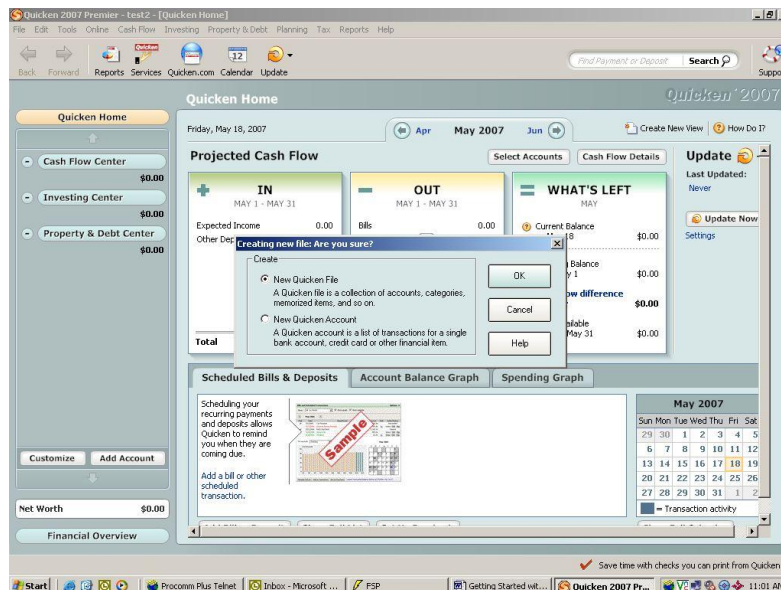
Getting Started with Transaction Download for Quicken 2007 Web Connect

The newest version of Quicken (Quicken 2007) has a built in “Express Setup” wizard which will guide you step by step in connecting to the Northwest United Federal Credit Union homebanking and automatically setup your accounts and download transactions. Even if you already use Quicken 2007, you can either use your current file, or create a new file to download all transactions kept in our Homebanking system. These instructions will cover creating a new file through the Quicken online banking interface.

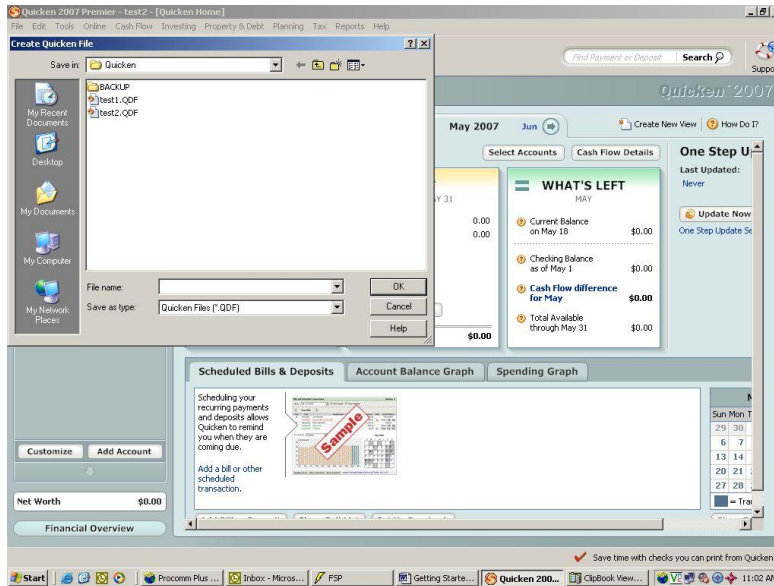
Additional assistance can be obtained by clicking “Help” on the menu, or by going to www.intuit.com.

Start Quicken, if you have never set up an account, the “Express Setup” wizard will start and prompt you through creating a new file. If you already use Quicken, it may be easier to create a new file to ensure your register does not include duplicate entries.

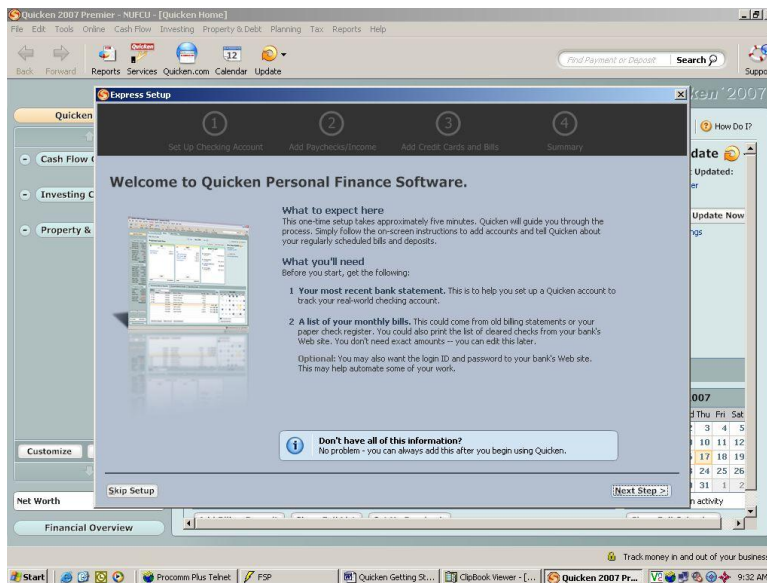
1. To create a new file, select “File” and “New”. In the pop up box, make sure “New Quicken File” is selected.



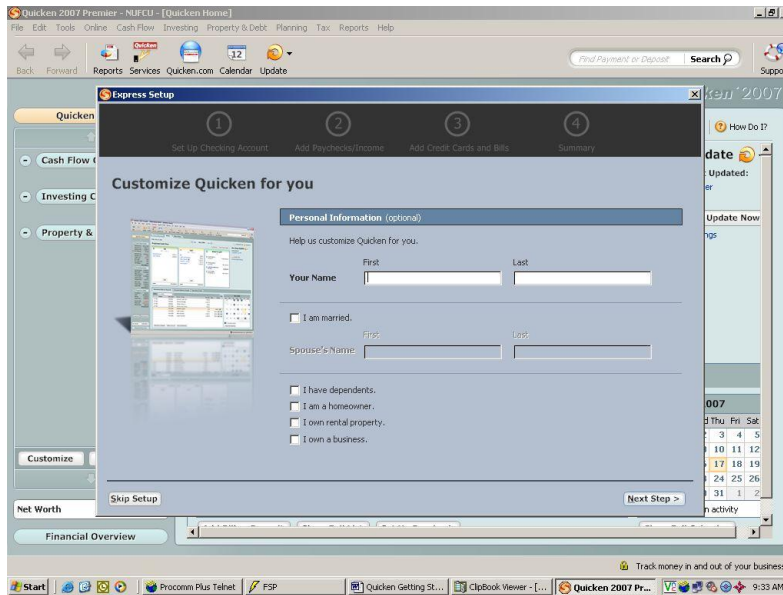
2. Select the destination folder and type a name for the new file (ie. NUFCU).



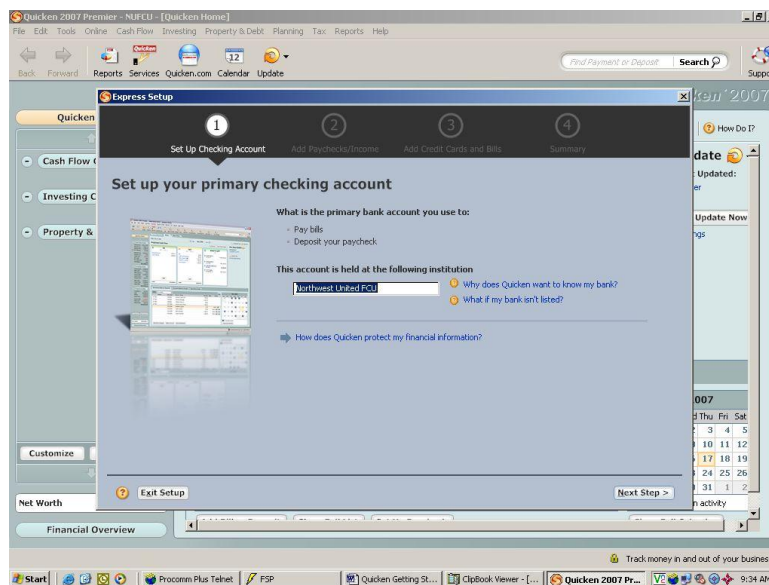
3. The picture below shows the wizard start screen. You will not need your billing statements at this point as our Homebanking currently only allows downloads. You will need your log on information to allow Quicken to automatically download and create your accounts in the new file. If you wish to track bills in Quicken, you will need to do this manually.



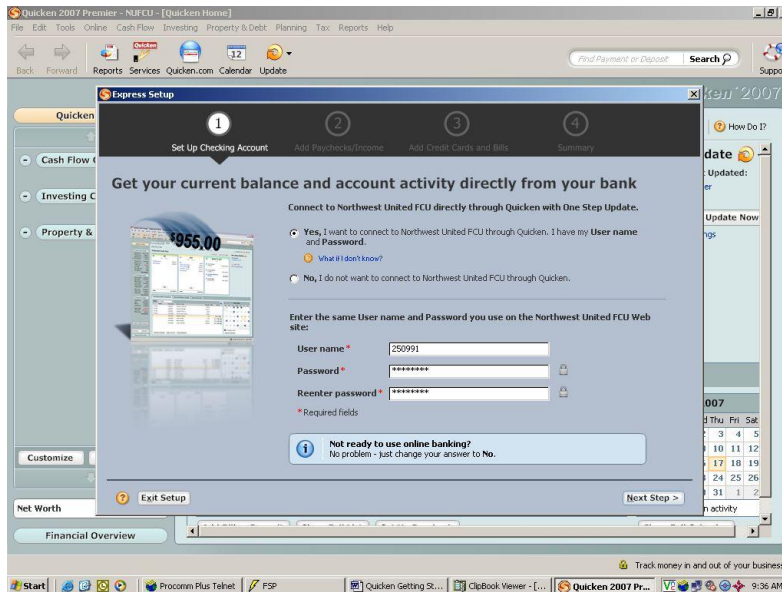
4. The next screen allows you to customize the file with your personal information. You can also add any joint account holders and indicate other information by selecting the appropriate check boxes.



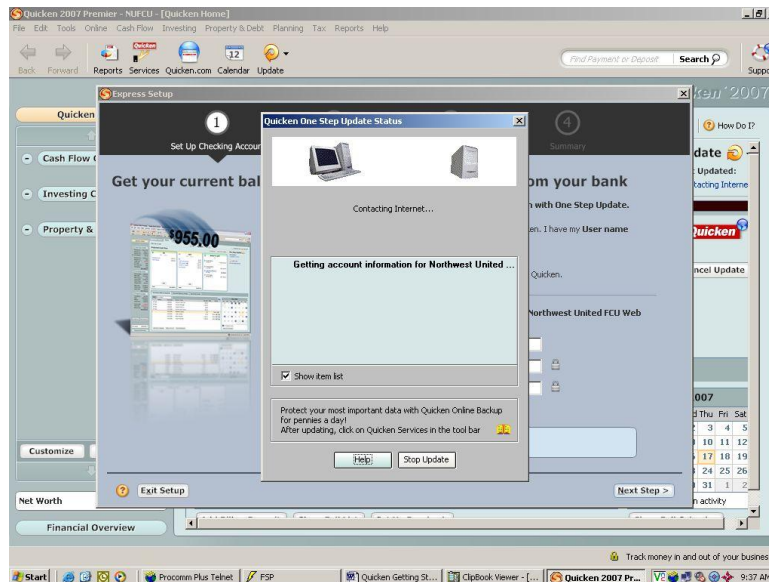
- The next screen allows you to select the Financial Institution your accounts are held at. Double click the white box to show the list and scroll down to and select "Northwest United FCU". There is also a Northwest Federal Credit Union, do not select that.



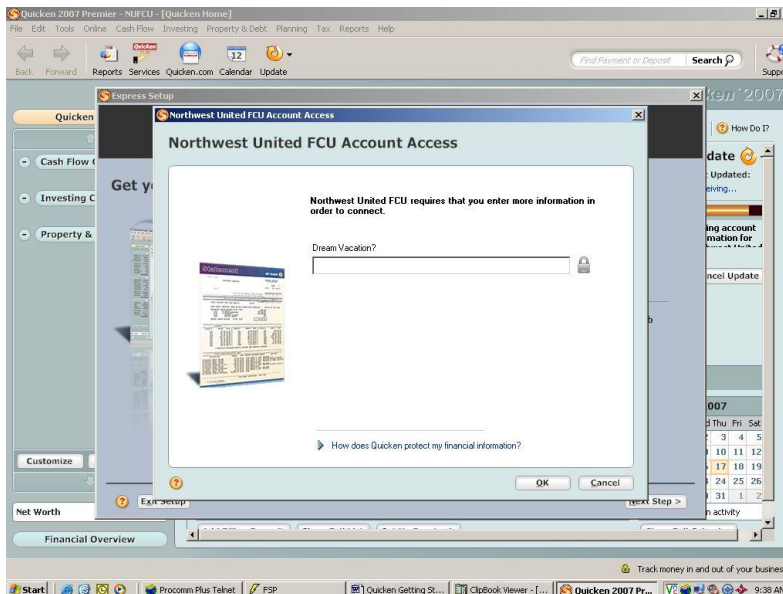
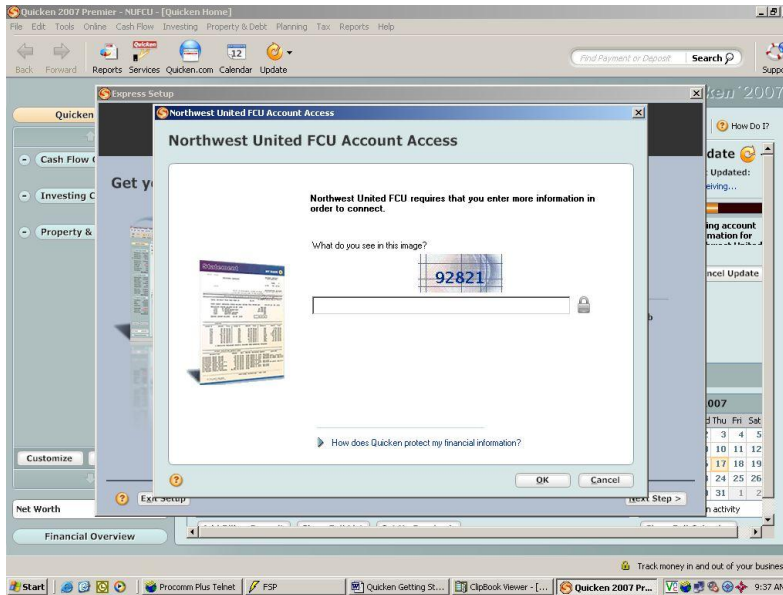
- To have Quicken retrieve your account information and create the accounts, select the top choice "Yes, I want to connect". The user name is your account number or the "Login Nickname" if you set that up when you enrolled. Then use your Homebanking password.



7. Once you click on “Next Step”, you will see popups showing the progress as Quicken logs into Homebanking to retrieve and create your accounts.

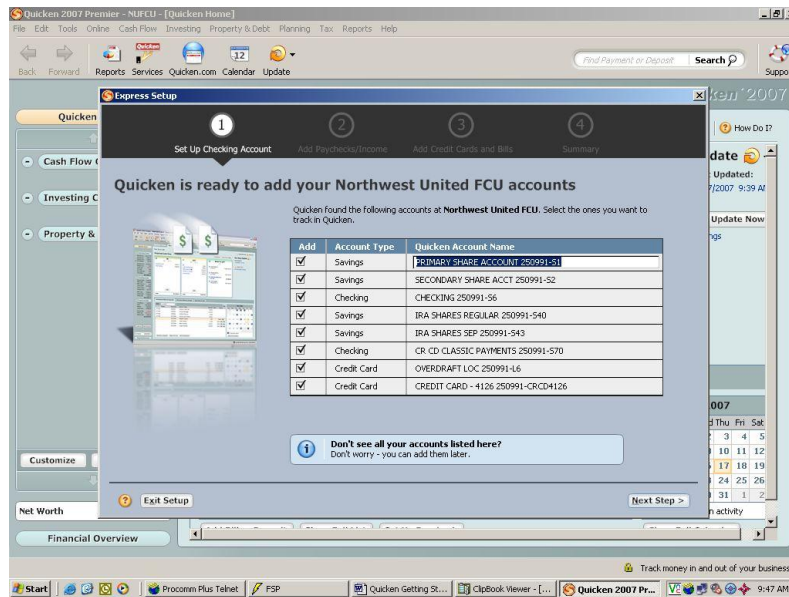


8. You will then be prompted for additional signon information as per the following pictures.



9. The next screen will show all sub-accounts under your account number. You can select any or all accounts to download. Please be advised that during the **first** setup, Quicken will pop up the Security Code and question screens to download each sub-account. *To prevent these windows during subsequent updates, you can sign on to Homebanking and on the password screen select the "Register this computer" option.*
10. Some accounts may not have transactions attached to them such as the Credit Card account (CREDIT CARD - XXXX XXXXXX-CRCDXXXX), so you may want to deselect them to save time in the download process., CD Classic and Gold Payments do show payment transactions from transfers within your account. If

you're not sure if an account has transactions, you can go to the "Accounts" button in Homebanking and click on the account to check it.



10 . Once you have selected the sub-accounts to be downloaded and click on "Next step", Quicken will begin downloading transactions and creating the sub-accounts. **Reminder** : A window to input the Security Code and then to answer a question will pop up for each sub-account you download. Again, once the accounts are setup, you will be asked for a Security Code and password only once to update the data. Quicken also has a "Password Vault" under the "Online" menu option, which you can use to bypass the system's prompt to enter your password. However, you will still be required to input a Security Code.