Getting Started with Quicken® 2007 for Mac®

Edward Jones

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

Before you can download your transactions with Quicken, you must have Internet access, your Customer ID, and PIN.

Your Quicken Customer ID and PIN are the User ID and Password that you use to log on to AccountLink.

For step-by-step help with an online task, choose **Help** menu → **Quicken 2007 Help**.

This guide includes the following sections:

- **Downloading the Latest Quicken Update**—Describes the steps to download free product updates as they become available for your version of Quicken.
- **Creating a New Quicken Account (Using Express Setup)**—Explains how to use Express Setup to create a new Quicken account for downloading transactions and paying bills online.
- **Keeping your Quicken Accounts up to Date**—Explains how to download transactions or send payments with accounts that you have activated for online account services.

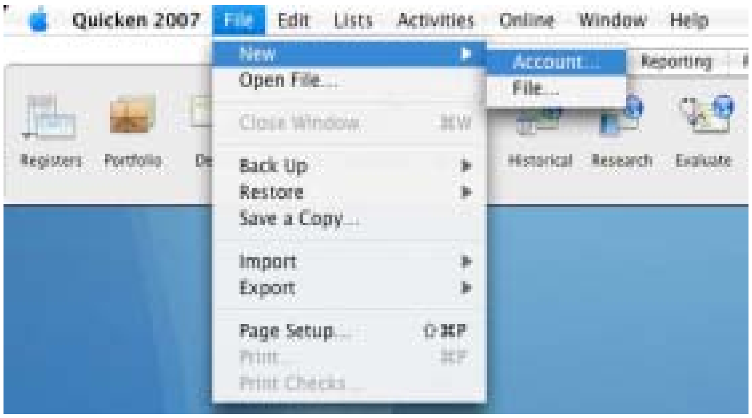
DOWNLOADING THE LATEST QUICKEN UPDATE

1. Choose **Quicken 2007** menu → **Check for Updates**.

2. Follow the on-screen instructions.

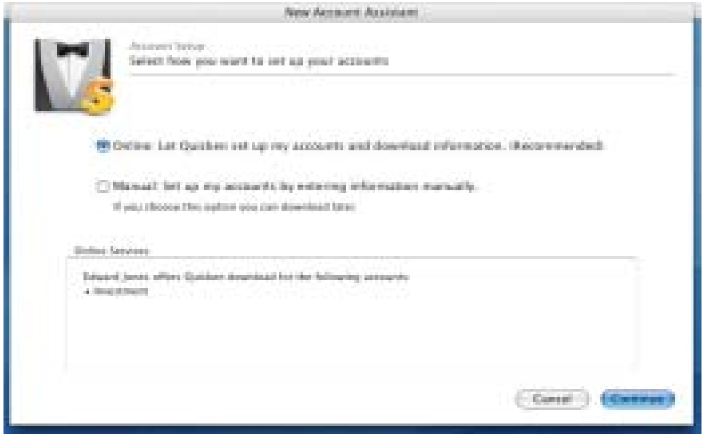
CREATING A NEW QUICKEN ACCOUNT

1. Choose **File** menu → **New** → **Account**.

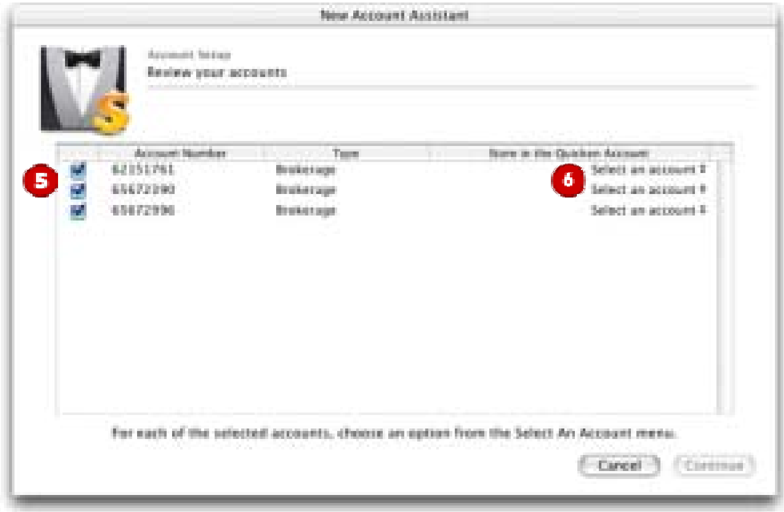


2. In the account setup window that appears, start typing Edward Jones. Select the Edward Jones in the list, and click **Continue**.

3. In the next window, click **Continue** to accept the **Online** option.



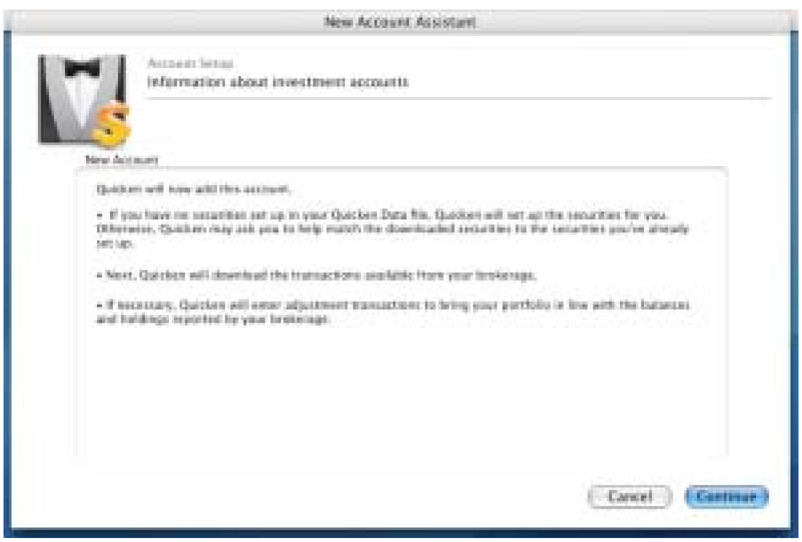
4. Enter your **Customer ID** and **PIN** in the next window. Click **Continue**. Quicken goes online to retrieve your account information.



5. Uncheck any account that you do not want to set up.

6. Click **Select an Account** to specify a Quicken account name or to use an existing register if you are presently manually entering transactions. Click **Continue** when you have specified how Quicken should handle each online account.

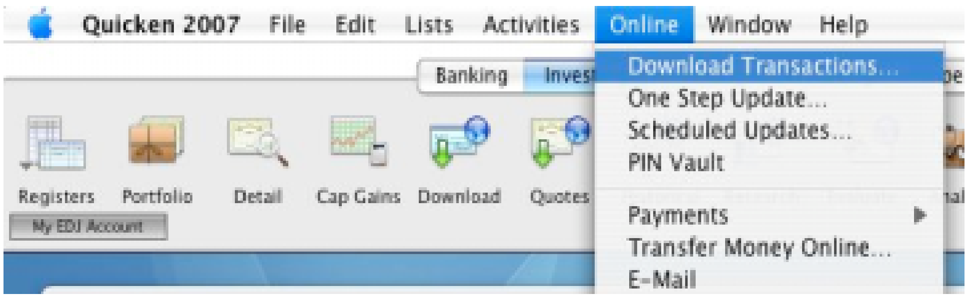
7. Click **Continue** to add the new investment accounts.



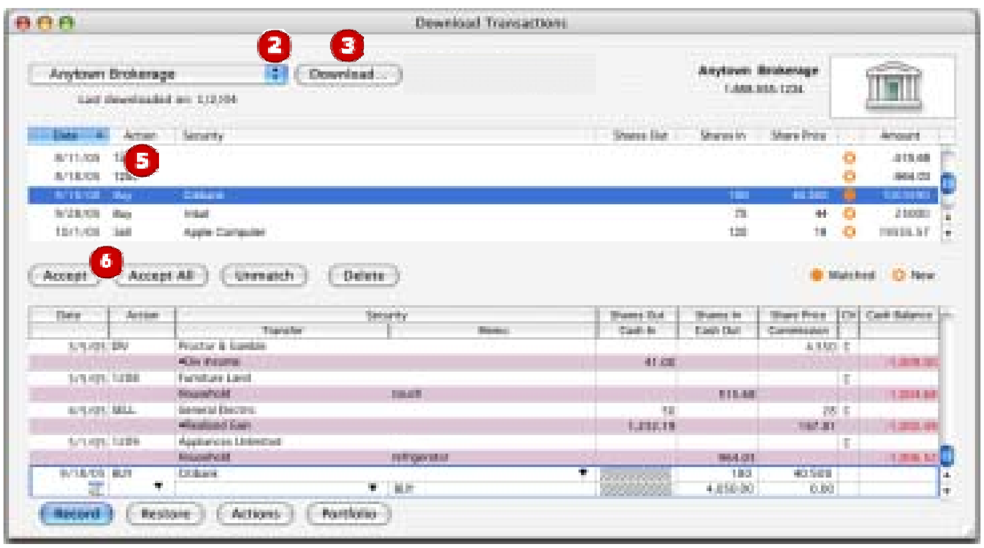
8. Follow the on-screen instructions to either accept all transactions or match downloaded transactions with existing transactions in your register. See **Working with your Downloaded Transactions** below.

Download Transactions into your Account Register

1. Choose **Online** menu → **Download Transactions**.



2. Choose Edward Jones and an account from the pop-up menu in the upper left of the window.



3. Click **Download**.
4. Enter your PIN Vault password or PIN (AccountLink password).
5. Quicken connects to the Internet and downloads your transactions for all online accounts at Edward Jones that you have set up in Quicken.

Working with your Downloaded Transactions

6. Click to select each transaction that you want to add in your register. You can hold down the **SHIFT** key and click additional transactions to select multiple transactions. If you make a mistake and want to deselect a transaction, click it again.
7. Click **Accept** to record the selected transactions, or **Accept All** to record all transactions. The accepted items are added to your register, marked C (cleared), and removed from the transaction list.

For additional information, review the Help topics provided in Quicken 2007.

CONGRATULATIONS, YOU ARE SET UP AND READY TO USE QUICKEN!