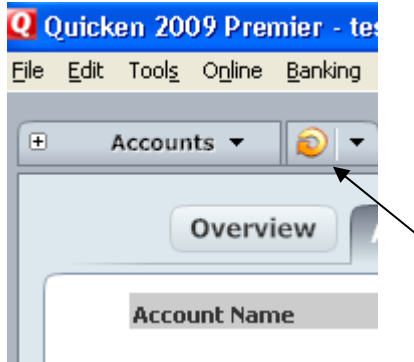
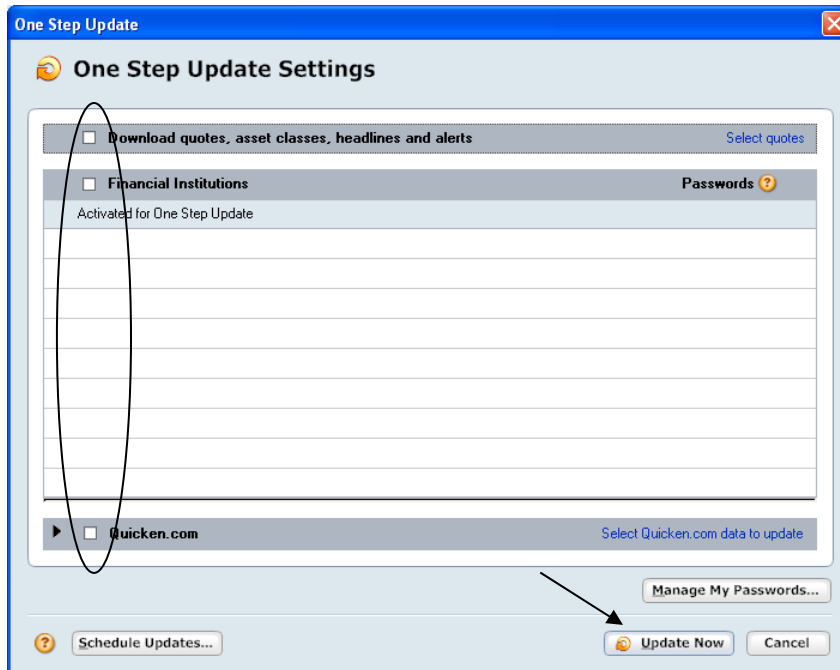


Quicken for Windows 2009 Direct Connect setup – New Users

1. Launch the Quicken application
2. Click the **Update** icon on the toolbar to get the latest update from Quicken



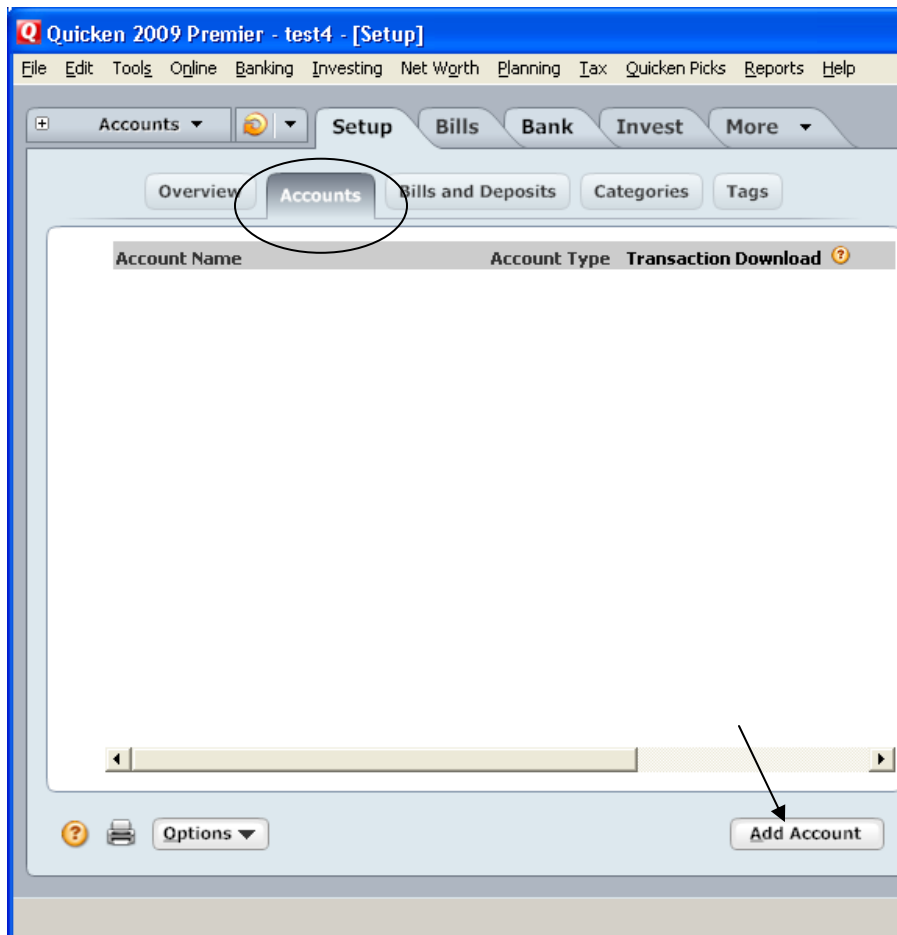
3. **Uncheck** all the checkbox in the One Step Update screen and click **Update Now**.



Note: If an update is available, click **Update Now**. Once the update has been applied, Exit and restart Quicken



4. Under the **Accounts** tab, click on **Add Account**



5. Select an account type and click **Next**

The screenshot shows the 'Account Setup' dialog box with a blue header bar. Below the header, the title 'Account Setup' is displayed. A section titled 'Select an account type' contains a list of radio button options: **Checking** (selected), Savings, Credit Card, Cash, Investing/Retirement, Asset, Debt (not including credit cards), and Loan. A black oval highlights the 'Checking' option. At the bottom right, a 'Next >' button is indicated by a black arrow. A 'Cancel' button is located at the bottom left.

6. Type in **Wings Financial** and click **Next**

The screenshot shows the 'Account Setup' dialog box at a later stage. The title 'Account Setup' is at the top. The main heading is 'What is the financial institution for this account?'. There are two radio button options: **The account is held at the following institution** (selected) and **I do not want to enter my financial institution**. Under the first option, there is a search interface with a row of buttons labeled A through Z, and three buttons labeled 'Bank of ...', 'First ...', and '1st ...'. Below this is a text input field containing 'Wings Financial', with a black arrow pointing to it. A security notice with a lock icon reads 'Your password and data are secure. Find out how Quicken protects you.' At the bottom right, a 'Next >' button is indicated by a black arrow. A '<< Back' button is to its left, and a 'Cancel' button is at the bottom left.

7. Select **YES** and click **Next**

The screenshot shows the 'Account Setup' window with a blue header. Below the header, there is an information icon and the text 'Transaction download available! This allows you to get information from your bank without leaving Quicken.' Below this is the question 'Do you want to download your balance and account activity directly from your bank using Quicken?'. There are three radio button options: 'Yes, connect to Wings Financial through Quicken (recommended option)', 'No, I'll visit my bank web site to download transactions into Quicken myself', and 'No, I'll manually enter my transactions into Quicken'. The first option is selected. Below the options is a security notice: 'Your password and data are secure. Find out how Quicken protects you.' At the bottom, there are 'Cancel', '<< Back', and 'Next >>' buttons. Arrows point to the 'Yes' option and the 'Next' button.

8. **Existing Users** can type in their Wings Financial ID and Quicken Password (Note: Not your CU Online password) and click **Next**. Skip to **step 16**

New Users - Click "I do not have a Wings Financial username and password" and click **Next**

The screenshot shows the 'Account Setup' window with a blue header. Below the header, there is an information icon and the text 'Transaction download available! This allows you to get information from your bank without leaving Quicken.' Below this is the question 'Log in to enable transaction download in Quicken'. There are two radio button options: 'Log in using my Wings Financial ID and Password' and 'I do not have a Wings Financial user name and password'. The first option is selected. Below the first option are three input fields: 'Wings Financial User ID / username', 'Wings Financial password', and 'Reenter password'. Below these fields is a checkbox: 'I have previously signed up for Direct Connect through Wings Financial (If you select this option, use your Direct Connect ID and password)'. Below the second option is the text '(I have never logged in to my Wings Financial web site)'. At the bottom, there are 'Cancel', '<< Back', and 'Next >>' buttons. A box labeled 'Existing Users - Type in your information' has an arrow pointing to the password fields. A box labeled 'New Users - Click here to register' has an arrow pointing to the second radio button option. Another arrow points to the 'Next' button.

9. Click **Sign Up Now**

Account Setup

You need **login information from Wings Financial** in order to have automatic downloads in Quicken.

Contact Wings Financial to get an online account for downloading transactions

Need a Customer ID and Password?

- Get your Customer ID and password the same day
- If you use Bill Payer and pay 3 or more bills per month - then it's free. If you pay less than 3 bills per month - a \$5.95 fee will be charged.

Sign Up Now ←

[Wings Financial Customer Support](#)
or call 800-692-2274 to sign up or for help

Continue- I will enter my transactions manually (you can set up automatic downloads later).

I have a Direct Connect user name and password. Let me try again

Cancel << Back Next >>

10. Type in your **Wings ID** and **CU Online password** and click **Register**



Welcome To Direct Connect Registration

Welcome to registration for Wings Financial Federal Credit Union's Direct Connect for Quicken and Money. If you are currently a user of CU Online, please enter your Wings ID# and Password below and begin the registration process. If you are not yet a user of our Internet Banking service, find out how you can enjoy the convenience of banking online by pressing the "Sign Up" button, below!

Registration for Direct Connect	New to Wings Financial Federal Credit Union
Enter your Wings Financial Federal Credit Union CU Online Wings ID# and Password below, then click on Register!	If you are not yet enrolled in Wings Financial Federal Credit Union's Internet Banking, click here to join!
<p>User Information</p> <p>Wings ID# <input type="text"/></p> <p>Password: <input type="password"/></p> <p>Register</p>	<p>Sign up</p>

11. Read the Online Banking Agreement and click either **I Agree** or **I Disagree**
Note: To use this service, you must click **I Agree**



Online Banking Agreement

I Agree

I Disagree

CU Online Disclosure

12. Fill out the **Direct Connect Registration Form** and click **Submit Enrollment**



Direct Connect Registration Form

Please enter your personal information below. Once your application is approved you may access your financial data from your favorite personal finance manager.

Name:*	<input type="text"/>	(?)
Address:*	<input type="text"/>	(?)
Address1:	<input type="text"/>	(?)
City:*	<input type="text"/>	
State:*	Please Choose <input type="button" value="v"/>	
Zip:*	<input type="text"/>	(?)
Phone Number:*	<input type="text"/>	
Email Address:*	<input type="text"/>	(?)

Enter and confirm the password you wish to use to access your accounts. It is suggested that you use a different password than you use for CU Online. Your password must be between 6 and 8 alpha numeric characters. Please make a note of your password and place it in a safe location.

Password*	<input type="text"/>	(?)
Confirm Password*	<input type="text"/>	(?)

* Required Fields, (?) = Help

Submit Enrollment

13. Verify your information and click **Confirm**



Verify Registration Information

Please review the following information.

Name: John Smith
Address: 123 Main St
Address1:
City: Apple Valley
State: MN
Zip: 55124
Phone Number: (952) 997 - 8000
Email Address: jsmith@test.com

Confirm

14. Close your Internet browser after you have completed the enrollment process



Enrollment Complete.

You can now set up your account as a new account.

15. Go back to your account setup screen and type in your **Wings Financial ID** and “Quicken” **password** and click **Next**

The screenshot shows the "Account Setup" window. At the top, there is a blue header with the "Account Setup" title. Below the header, there is a section titled "Transaction download available" with an information icon and a link to "Find out how". Underneath, there is a section titled "Log in to enable transaction download in Quicken". The main section is titled "Log in using my Wings Financial ID and Password" and contains three input fields: "Wings Financial User ID / username", "Wings Financial password", and "Reenter password". To the right of these fields is a security message: "Your password and data are secure. Find out how Quicken protects you." Below the input fields, there is a checkbox labeled "I have previously signed up for Direct Connect through Wings Financial (If you select this option, use your Direct Connect ID and password)". At the bottom of the window, there are three buttons: "Cancel", "« Back", and "Next »". A black oval is drawn around the "Log in using my Wings Financial ID and Password" section, and a black arrow points from the bottom right towards the "Next »" button.

16. Quicken will list your Wings Financial accounts. Click **Next**

Account Setup

Quicken found the following accounts at **Wings Financial**.

Check the accounts you'd like to add to Quicken.

Select	Account	Type	Account Name (to use in Quicken)
<input checked="" type="checkbox"/>	8101234567 Checking	Checking	<input checked="" type="radio"/> New In Quicken <input type="text" value="Enter account nickname"/> <input type="radio"/> Exists In Quicken
<input checked="" type="checkbox"/>	123456789 Mortgage Loan	Line of Credit	<input checked="" type="radio"/> New In Quicken <input type="text" value="Enter account nickname"/> <input type="radio"/> Exists In Quicken

17. Determine whether you want to use the Password Vault and click **Next**

Account Setup

Keep your financial institution password in Quicken's secure Password Vault
This allows you to access all of your connected accounts with one password.

Would you like to store your password in the Password Vault?

Financial Institution **Wings Financial**
User ID **123456**
Password *********

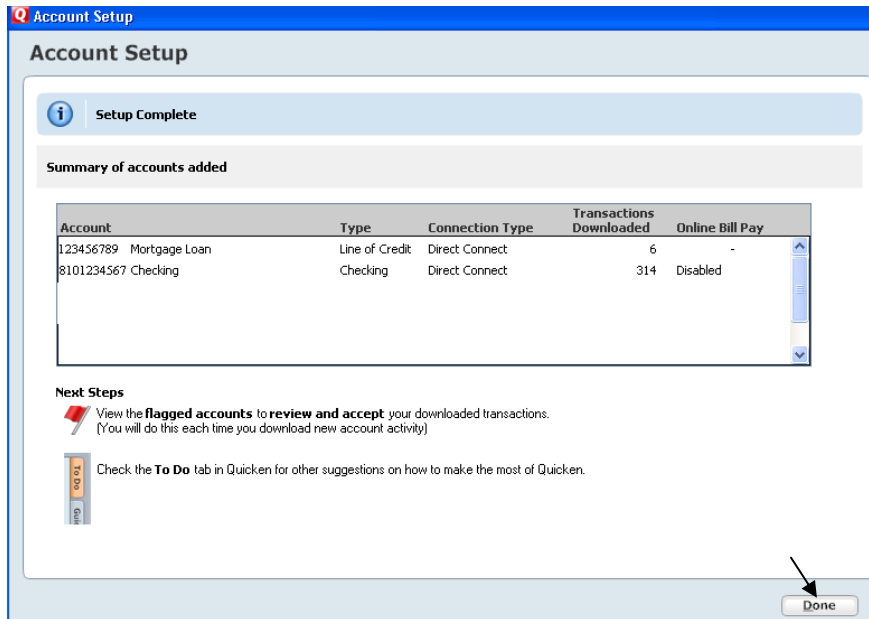
Yes

Select an easy to remember password to use for your password vault.
You'll use your Password Vault password to access all of your stored financial institution passwords

Password for the Password Vault Password must be at least 6 characters
Re-enter Password

No (I'll enter my financial institution password each time I download transactions.)

18. Click **Done**



19. Your account information should now show up in Quicken