Getting Started with Transaction Download for Quicken 2005-2006 for Windows – Web Connect

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

CANYON national bank®
LOCALLY OWNED AND MANAGED

This guide includes the following sections:

Set up a Quicken Account and Download Transactions for the First Time, page 2—Explains how to use Express Setup to create a new Quicken account and download transactions.

Keeping your Quicken Accounts Up-to-Date, page 3—Explains how to download transactions on an ongoing basis.

Information You'll Need to Get Started

To download your transactions with Quicken, you must have Internet access. In addition, to complete setting up your Quicken accounts with transaction download you will need to log into the Canyon National Internet Banking Web site http://canyonnational.com . *(iBank / iCorp)*

This guide will show you how to setup and download your accounts. For step-by-step help with an online task, choose **Learn About Downloading Transactions** from the Quicken **Help** menu.

Important: First, get the latest program updates!

To get the latest directory of participating financial institutions and program updates click **Update** on your Quicken toolbar. In the dialog, click **Update Now**, Quicken will automatically check for available updates. When this download process is complete, **exit** and **restart** Quicken.

Special note to former QIF Import users

Web Connect offers superior download capability. You will enjoy an easier, and more accurate download, without having to import and find your file, worry about duplicates, or even manually launch Quicken! You can convert your existing Quicken account to download via Web Connect. If your financial institution offers multiple download options on the Web site, be sure to select **.QFX** Web Connect – not the older .QIF file format.

It's easy to switch from QIF, simply follow the steps in the next section.

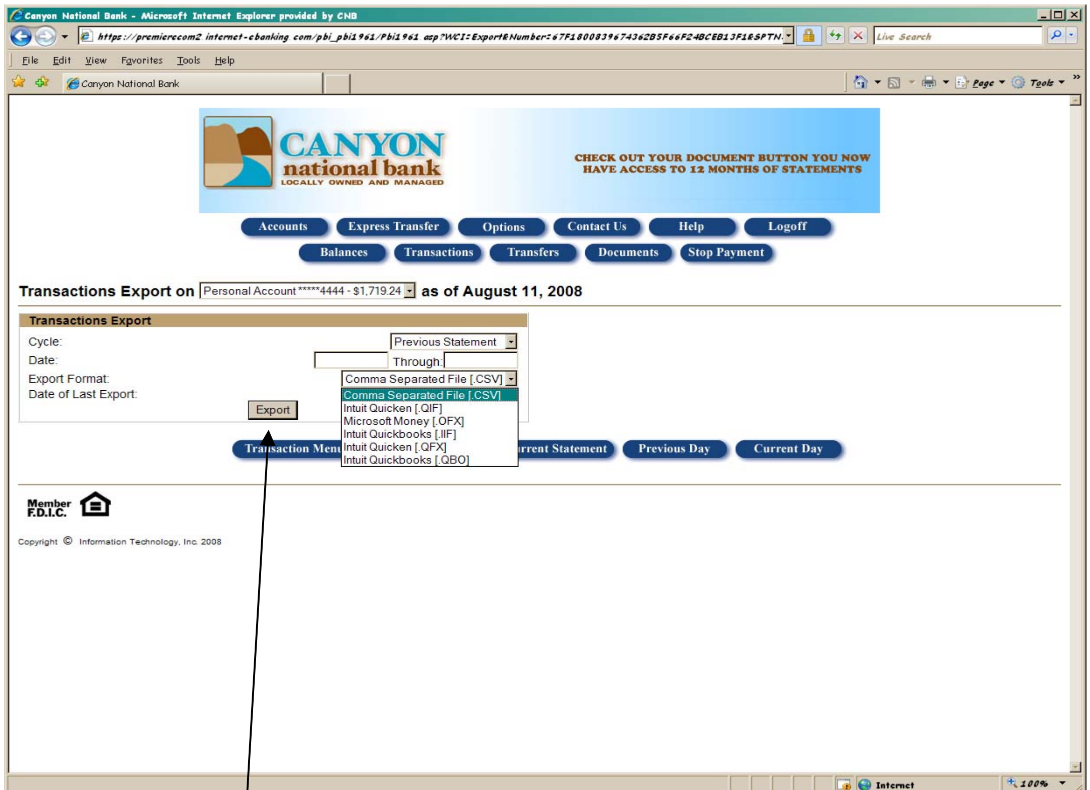
Set up a Quicken Account and Download Transactions for the First Time

The following steps explain how to activate your existing Quicken account(s) or create one or more new Quicken accounts for Web Connect online access.

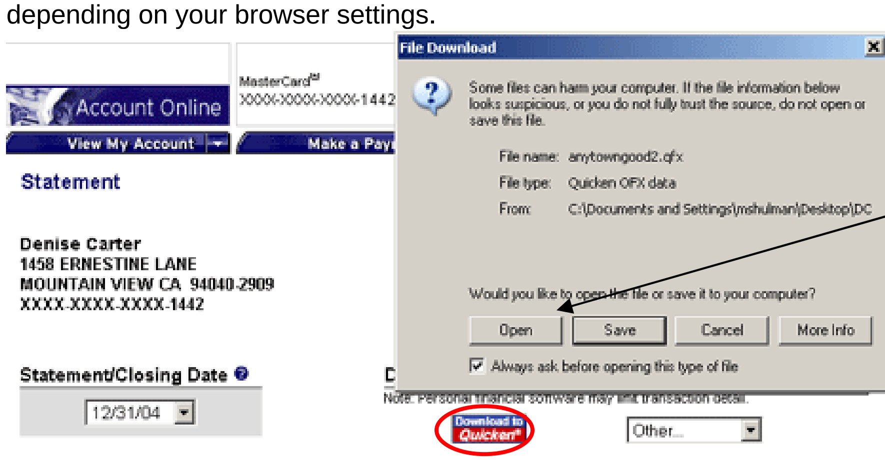
Step 1 Log into your financial institution's **Web site** and follow the instructions provided on the web site to download your account information into Quicken.

After you have logged on, Select the account you want to have downloaded into Quicken. From the Transaction Tab select Export Transactions:

Enter the Cycle you wish to download, if All you can put in a date range also. Select the file Export format, for Quicken select the .QFX file.

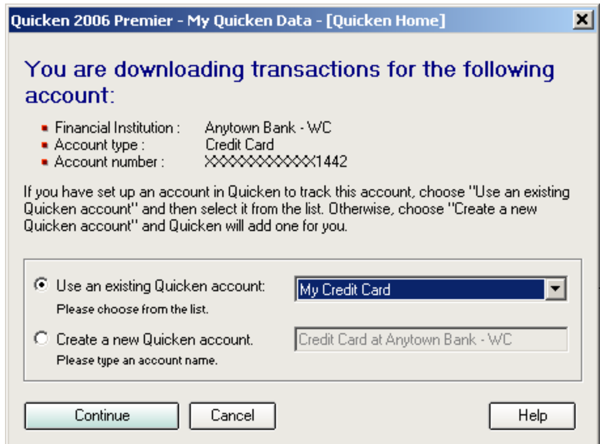


Step 2 When you click **Export**, Your browser may display the following dialog box depending on your browser settings.



Click **Open**, so that Quicken will automatically launch, and the QFX file will be processed without any extra steps

Step 3 In Quicken, click the **Use an Existing Quicken account** and select an account that you manually enter transactions or perform QIF imports. Or, click the **Create a new Quicken account** radio button and type a name for the account, and then click **Continue**.



The first radio button, **Use an Existing Quicken account** lets you download into an account that you manually enter transactions or perform QIF imports

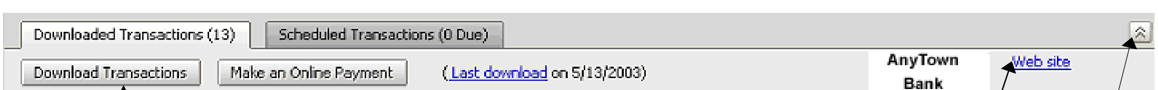
Note: You only need to select the account for this first download. After the account is activated for Web Connect account access, future downloads will download to this account automatically.

Step 4 When Quicken confirms that the Web Connect data has been successfully downloaded to Quicken, click **OK**. Your first download is complete. Refer to the following section to download transactions from now on.

Keeping Your Quicken Accounts Up-to-Date

Step 1 To download transactions or to send online payments directly from your account register, click **Download Transactions** located at the bottom of your account register.

Step 2 Log in to your Financial Institution's Web site and follow the on-screen instructions to complete downloading transactions.



Download Transactions from the online toolbar in your account register

Links to the Financial Institution's **Web site**

Minimize or Maximize the **Downloaded** and **Scheduled Transactions** tabs

Updating Accounts from the Online Center

The **Online Center** also lets you easily download transactions to or make payments from the accounts that you have activated for online account services.

> **Easy Access**: From the **Online** menu, select **Online Center**.