

Getting Started Guide: Direct Connect Transaction Download for Quicken®

Information You'll Need to Get Started

Before you enable your Quicken accounts to download transactions you will need to have previously requested access to our Online Banking system. You will also need:

- Your NetTeller ID and your Business Cash Management ID (if applicable)
- Your NetTeller PIN and your Business Cash Management PIN (if applicable)

Set Up Online Account Access for a New Account

The following steps explain how to enable a new Quicken account for transaction download and/or online bill payment:

- Step 1** Select the **Accounts** tab and click **Add Account**.
- Step 2** Select the account type (**Checking** or **Savings**) and click **Next**.
- Step 3** The Account Setup window appears. Search for bank names starting with "A", select American National Bank, FL, and click **Next**.

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.

American National Bank, FL

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

I do not want to enter my financial institution

Note: Selecting this option means you will not be able to download transactions from your financial institution into Quicken. [What does this mean?](#)

Help

[Why does Quicken want to know my bank?](#)

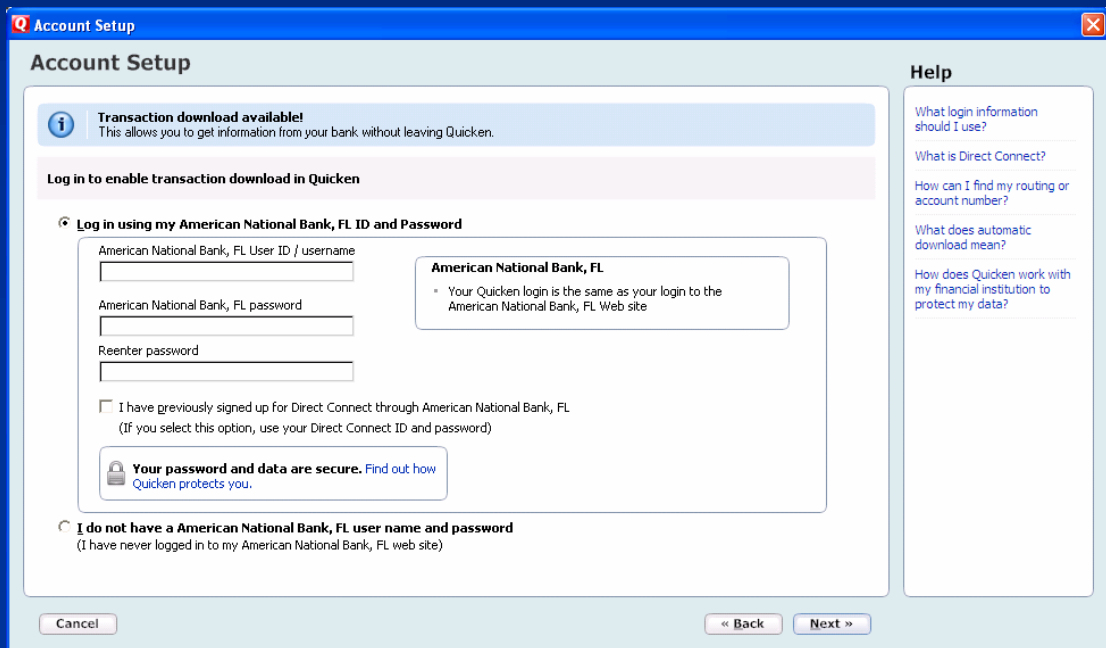
[How does Quicken protect my financial information?](#)

[What if I don't enter the name of my financial institution?](#)

[How does Quicken work with my financial institution to protect my data?](#)

Cancel << Back Next >>

Step 4 Enter your account information to sign in. If you only have a NetTeller ID, enter that in the **User ID/Username** field and your NetTeller PIN in the **Password** field. If you have a Cash Management ID, enter your NetTeller ID space Cash Management ID in the **User ID/Username** field. You must enter a space between your NetTeller ID and Cash Management ID. Do not use an underscore or a dash to link the IDs. If you have a Cash Management ID, you should enter your NetTeller PIN space Cash Management PIN in the **Password** field. You must enter a space between your NetTeller PIN and Cash Management PIN. Do not use an underscore or a dash to link the PINs. Re-enter your PIN in the **Reenter Password** field. Make sure you check the box that refers to **Direct Connect** and click the **Next** button.



Step 5 A window will display listing your bank accounts. Select the account that you want to set up in Quicken and click **Next**.

Step 6 The next window will ask if you want to store your password in the Vault. This is an optional feature of Quicken that allows you to store your User ID and Password information for all of your accounts in one place. If you choose this feature you will only need to enter the Vault password whenever you log in to any of your online accounts. Choose the option that you want and click **Next**.

Step 7 Your account setup is complete. Click **Done** and review your downloaded transactions.

Account Setup

Setup Complete

Summary of accounts added

Account	Type	Connection Type	Transactions Downloaded	Online Bill Pay
Test Checking	Checking	Direct Connect	4	Yes (Bank Billpay)

Next Steps

- View the **flagged accounts** to **review and accept** your downloaded transactions. (You will do this each time you download new account activity)
- Check the **To Do** tab in Quicken for other suggestions on how to make the most of Quicken.

Help

- What does Connection Type mean?
- What does Transactions Downloaded mean?
- What is Online Bill Pay?
- How do I view my register?
- What is the To Do tab?
- Where should I go from here?

Done

Set Up Online Account Access for an Existing Account

The following steps explain how to enable an existing Quicken account for transaction download and/or online bill payment:

Step 1 Select the **Accounts** tab and click on the account you want to work with.

Step 2 On the **Account** window, if you just need to setup online bill payment click **Set Up Online Payment** and then click **Activate** for the American National Bank Bill Pay Service. To setup your online download, click **Set Up Download**. Continue at **Step 3** of **Set Up Online Account Access for a New Account**.

