Getting Started with Quicken 2007-2008 for Windows

Before you can download your transactions with Quicken, you need Internet access, your customer ID, and your password.

This guide includes the following sections:

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

For step-by-step help with an online task, choose Help menu \rightarrow Quicken Help. In the Type in the word(s) to search for: prompt, enter Download Transactions.

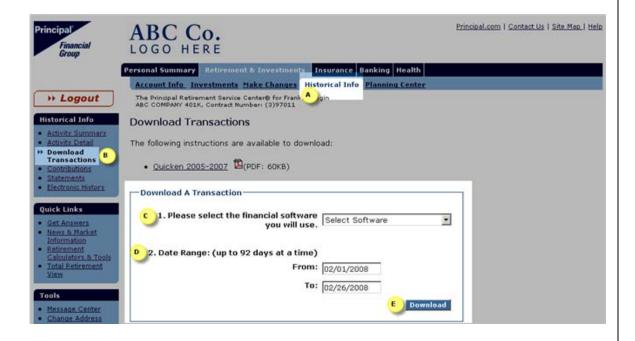
Note to former QIF Import users: Web Connect offers superior download capability. You will enjoy an easier and more accurate download, without having to import and find your file, worry about duplicates, or even manually launch Quicken! You can convert your existing Quicken account to download via Web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

Download the Latest Quicken Update

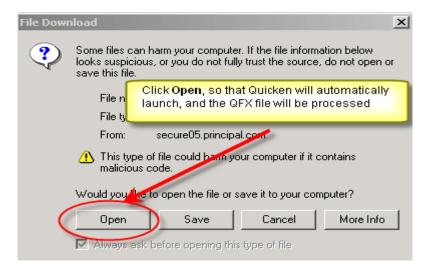
- **1.** Click the Update icon on the Quicken toolbar.
- 2. Uncheck all boxes, and click Update Now in the One Step Update Settings dialog.
- **3.** If an update is available, then Quicken provides a description of the update and brief instructions for downloading the update.
- **4.** When the update completes, restart Quicken.

Create a New Quicken Account

- **1.** Open a Web browser and log into the Principal Financial Group's website at **www.principal.com**. Select the retirement account that you wish to download balance and transactional information on.
- **2.** Once you are in the retirement account you wish to download information on:
 - A. Select the Historical Info Tab
 - B. Select the **Download Transaction link** available in the left navigation.
 - C. Select the appropriate software from the drop-down box: Quicken '05 or Newer.
 - D. Indicate a date range that you desire.
 - E. Select the **Download** button.

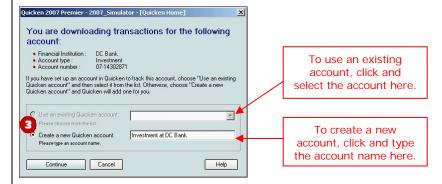


3. When you click on the **Download button**, your browser may prompt you to open or save the file. If this prompt appears, select the **open** button.



4. To set up a new account in Quicken, click Create a new Quicken account, and type a name for this account. Click Continue.

To select an account that you have been using to manually enter transactions, click Use an existing Quicken account, and then select the existing account from the drop down list. Click Continue.



- **5.** You may see one or more of the following screens depending on your financial institution and account.
 - If you activated any retirement accounts, enter the information that is requested.
 - If the Cash Balance Adjustment dialog displays, enter the cash balance for the account and click Done.
 - If the Stock Splits May be Missing dialog displays, select the stock splits that you want to add or replace in your registers and price history and then click OK. Or click Cancel to continue without selecting any stock splits.
- **6.** Follow the on-screen prompts to complete the account setup.
- **7.** When the update completes, Quicken displays your holdings at The Principal Financial Group. To open your account, select the appropriate account under the Investment Center.

Keeping Your Quicken Accounts Up To Date

Update Accounts from the Online Center

The Online Center provides additional functions. Within the Online Center, you can easily download transactions to, send payments from, or transfer money between the accounts that you have activated for online account services, depending upon which options your financial institution supports.

To open the Online Center, choose Online menu → Online Center.

