

# Quicken SIG Notes – February 24, 2004

## Username and Passwords .....

### Quicken:

Quicken uses usernames and passwords to access financial sites for you. If you have activated a banking account for downloading and/or for online banking, Quicken can store your username and password for you. If you have activated multiple accounts, it is helpful to use Quicken's Pin Vault capability. To activate the Pin Vault, go to the upper menu and select **Online – Pin Vault – Setup**. You will see the following figure.



**Pin Vault Setup**

Click next and select the name of your financial institution from the drop down list. The next screen will allow you to enter the password for your financial institution.



**Pin for Financial Institution**

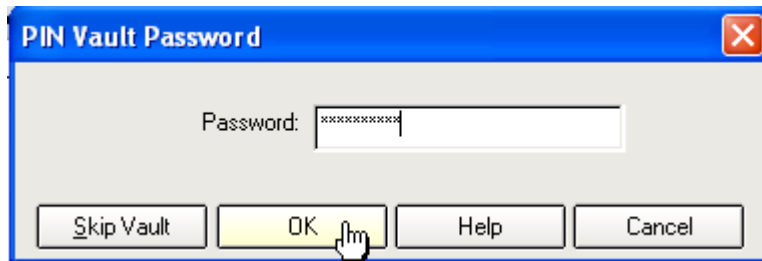
Enter the password for your financial institution and select next. You will be asked to enter a password for the Pin Vault. This should be one that is secure, but easy to remember since you will enter it each time you use Quicken's downloading or online banking access services.



**Pin Vault Password**

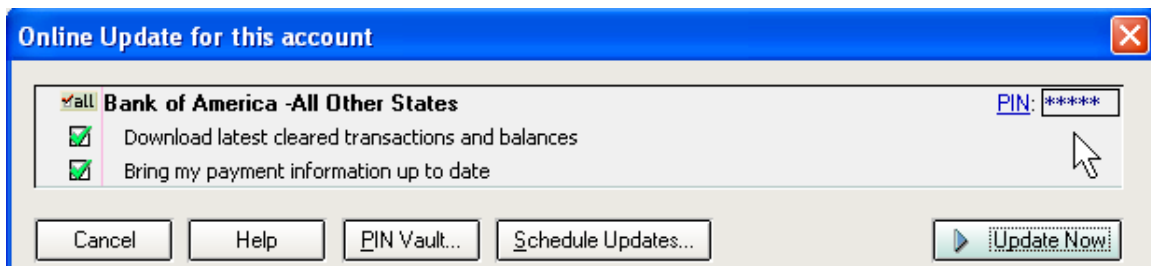
You have initialized your Pin Vault. You can add additional passwords for more online accounts at any time.

Here is an example of how the Pin Vault is activated for normal processing. Say you want to download the latest transactions in one of your financial accounts. Select **Online – Online Center**, select the **Transactions** tab, and then select the **Financial Account** from the drop down list. Click on the **Update/Send** icon, and you will see the enter password screen for the Pin Vault. Enter the password for



**Pin Vault Password Entry**

the Pin Vault, and click OK. This gives the account online update screen.



**Account Update Screen**

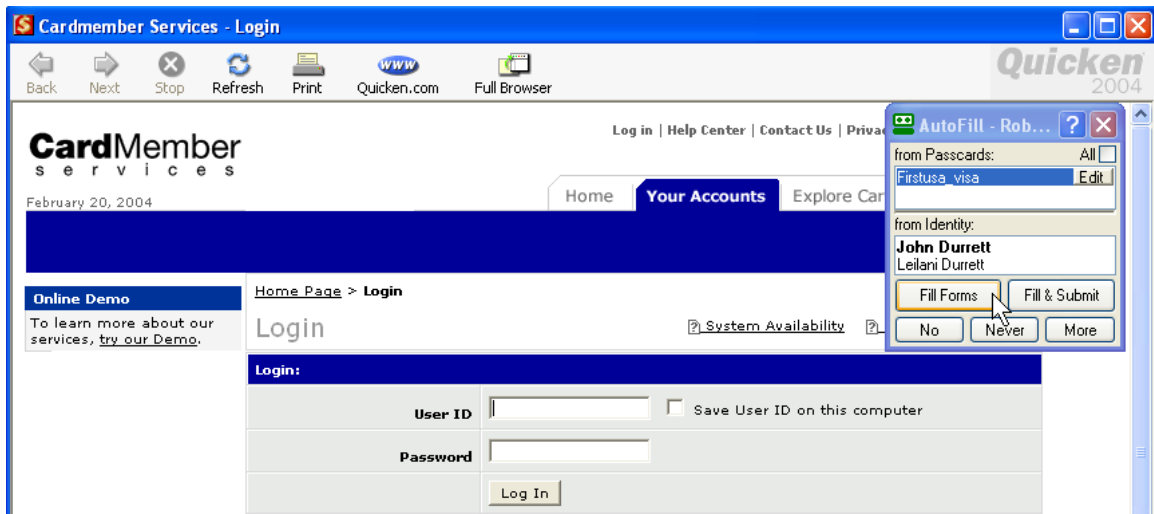
Notice that the Pin Vault has extracted the correct Pin number for your financial institution and entered the Pin number into the PIN: slot in the upper right hand corner. All you do now is click on the Update Now icon and Quicken does the rest, downloading the transactions from the financial institution.

The Pin Vault works fine for passwords selected for accounts with institutions that use a Quicken Direct Connect link. But what about accounts with companies that use a Web Connect link? In those cases, Quicken opens its Browser and you have to enter the username and password by hand.

## AI Roboform

I want to introduce you to a Pin Vault capability that works for the entire Web. Whenever you see a web page that needs a username and password, this program remembers them for you and at the click of a mouse, will enter them into the web site's form. There are several programs that can remember usernames and passwords, but the one I like best is AI Roboform. It can be found at [www.robiform.com](http://www.robiform.com), and it is free! The web site also has a lot of instructional material on how Roboform works. The free version of Roboform will store usernames and passwords for up to 30 web sites. That's enough to get you started. I use Roboform to store secure entry data for sites like Amazon.com, Yahoo, NY Times, T Rowe Price, Bank One, Lands End, and many more. I will show how to download this program, install it, and use it during the Quicken SIG.

Here is an example of how Roboform works with Quicken. If I try to download transactions from an account that only uses Quicken Web Connect for its hook up, Quicken will open its Browser screen to the account's web site. If I were trying to get into a First USA bank site, Quicken would open to this screen.



**First USA Log In Screen**

But because I had previously set up the username and password in Roboform for this site, Roboform offers a mini screen in the upper right hand corner. To enter the correct User ID and password for this web site, all I have to do is click on the Fill Forms icon, and Roboform will enter them. Then I click the Log In icon on the web site, and I can download any transactions I want. I do not have to remember the unique username and password for this web site. Roboform does that for me.

If you find Roboform to be a useful program and would like to keep track of more than 30 web sites, you can easily upgrade to Roboform Pro for \$29.95. I bought Roboform Pro for two reasons. The first was because I believe that any private company that writes a program this good and gives free updates for all new versions deserves the financial incentive I can give them by buying a copy. The second reason is that I have around 100 websites that I need to keep track of, and I need the larger capacity of Roboform Pro.

Article by John Durrett  
[jcdurrett@robsoncom.net](mailto:jcdurrett@robsoncom.net)