

# Getting Started with Chesterfield Federal Credit Union and Microsoft® Money 2004

## Microsoft Money 2004 – Manage Today's Finances, Achieve Tomorrow's Goals

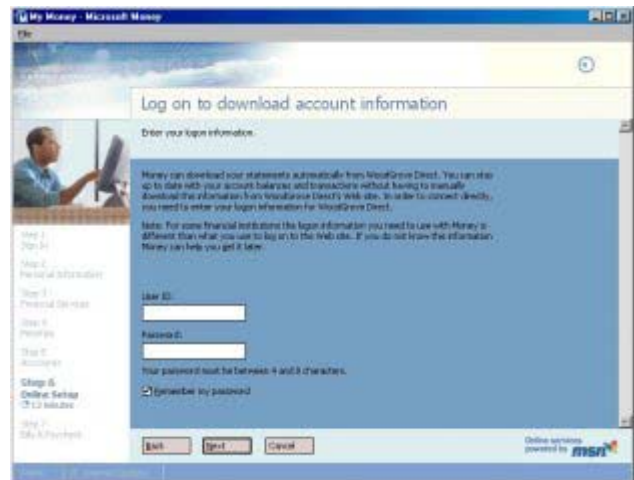
It's easy to get started with Chesterfield Federal Credit Union's online services and Microsoft Money 2004. With CFCU, you can monitor your accounts whenever you want. You don't have to wait for a paper statement because account activity is available to you online. And with this guide, it's easy to get up and running.

### New Microsoft Money 2004 User

1. You need to set up your accounts in Microsoft Money before you can activate them for online services. When you first open Microsoft Money 2004, click **Next** on the opening screen to allow Microsoft Money's Setup Assistant to help you. Be sure to click the **Click Here** link to download the latest list of financial institution partners.
2. The Setup Assistant will step you through the process of creating new accounts and assigning each account to the correct financial institutions.



3. Step through the Setup Assistant, creating your accounts until, Microsoft Money asks you to set up for online services. Click your financial institution name and proceed to enter your User ID and Password. If you don't know your user name and Password, Microsoft Money can help you find it.



4. Money then downloads your accounts from your financial institution.



5. Money 2004 will automatically download the latest information for you so that your account is always up to date. Just tell Microsoft Money how far back you want to go to download account transactions.



6. That is all it takes! Your accounts are now set up for online services in Microsoft Money 2004!

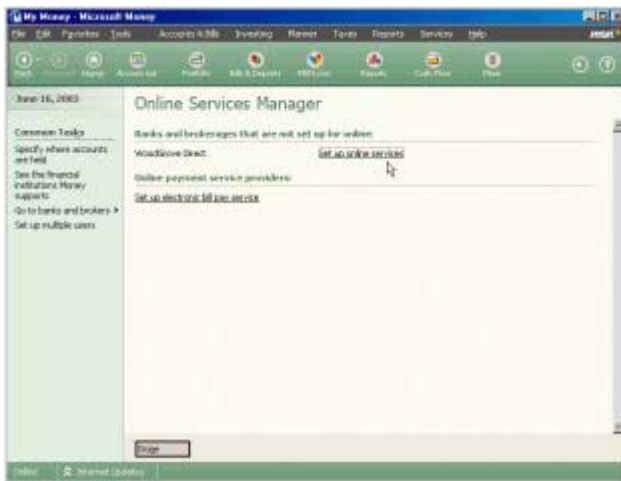


# Current Microsoft Money User

1. If Microsoft Money 2004 did not detect your most recently used file, click **Open** on the **File** menu to locate and upgrade your Microsoft Money file.
2. On the Microsoft Money Home page, click **Internet Updates** on the Online status bar at the bottom of the screen, and then click **Update Now** to download the latest information for Microsoft Money.
3. On the **Accounts & Bills** menu, click **Online Services Manager**.



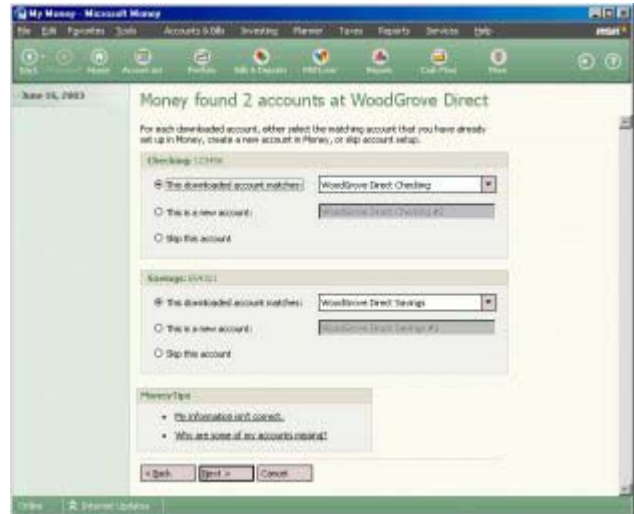
4. Click **Set up Online Services** and select your financial institution from the list provided by Microsoft Money 2004.



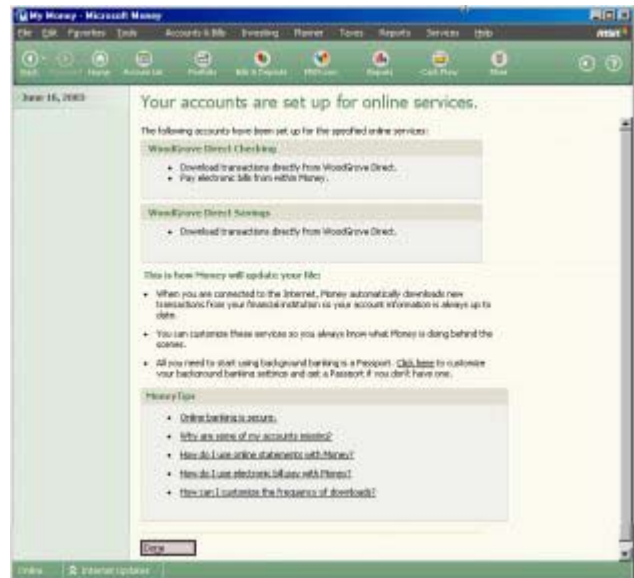
5. Enter your User ID and Password your received from your financial institution, and click **Next** to download your account information.



- Microsoft Money will match your existing accounts, or you can choose to create new accounts.
- Microsoft Money 2004 will automatically download the latest information for you so that your account is up to date. Just tell Microsoft Money how far back you want to download account transactions.



- That is all it takes! Your accounts are now set up for online services in Microsoft Money 2004!



## You're Now Ready to Connect!

If you associate your Microsoft Money file with a Microsoft .NET Passport account, Microsoft Money 2004 will download your statement information in the background based upon the schedule you select. For further information, please review the Help topics provided in Microsoft Money 2004.

You can also have Microsoft Money transmit bill payments, transfers, and e-mail requests to CFCU.

- On the **Accounts & Bills** menu, click **Account List**, and then click the account from which you want to make payments or transfers.
- In the **Common Tasks** section in the left pane, click **Make and electronic payment or transfer**, and then select **Make and electronic payment** or **Make and electronic transfer**. Microsoft Money 2004 will step you through the rest of the process!
- To send e-mail to Chesterfield Federal Credit Union, click on the CFCU Direct icon in the left pane of the account register, and then click **Send a message to Chesterfield Federal Credit Union....**

**Because There Is More To Life - Balance It**