Getting Started with InvestmentTransaction Download for
Quicken 2005 for Mac – Web Connect

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

This guide includes the following sections:

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 Bank Forward Web site.

This guide will show you how to setup and download your accounts. For step-by-step help, choose Quicken Help from the Help menu.

Important: First, get the latest program updates!

From the **Quicken 2005** menu, select **Check for Updates** and follow the on-screen instructions.

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 – <u>not</u> 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 Open a Web browser and log into your financial institution's Web site: **www.bankforward.com.** Log into your internet banking account, and follow the instructions provided to download your account information into Quicken. **Choose your checking or savings account from the listed accounts, then click on the Transactions button, and choose Transaction Export. Choose the desired timeframe for the transactions to be downloaded (in the Cycle drop down menu or using the Date fields), and then choose .QFX from the export format choices in the drop down menu.**

Step 2 Download the Web Connect file (.qfx file extension) and save it to your desktop.

Step 2Step 3 Open Quicken and from the **File** menu, select **Import Web Connect**. Locate the Web Connect file you just saved to your desktop and click **Open**.

Step 4 Click the **Use an existing account** radio button and select an account that you manually enter transactions or perform QIF imports. Or, click the **Create a new account** radio button and type a name for the account, and then click **OK**.

The first radio button, **Use an existing 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 3Step 5 Your downloaded transactions are displayed in the Download Transactions window.

Refer to the following section to download transactions from now on.**Important Note for IRAs:** If this is an IRA account see "Convert a brokerage account to an IRA" in the Online Help for Quicken.

Step 6

Keeping Your Quicken Accounts Up-to-Date

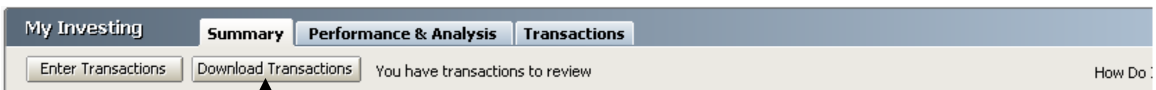
Step 2Step 1 From the **Online** menu, select **Download Transactions**.

Step 2 FollowChoose Bank Forward from the Financial Institution pop-up menu.

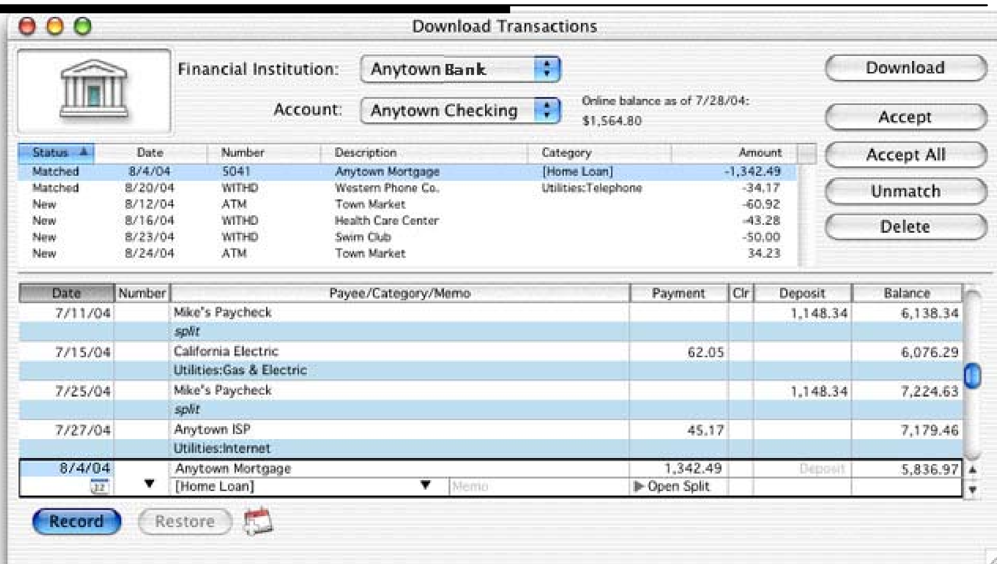
Step 3 Choose the account name from the Account pop-up menu.

Step 4 Click **Download**. Quicken will launch your default browser and take you to Bank Forward's Web site.

Step 5 Log into Bank Forward's web site and download the Web Connect file (.qfx file extension). Quicken will automatically locate the file on your desktop and display the downloaded data from this file in the Download Transactions window.



Download Transactions from the online toolbar in your Investment **Summary**



Step 5

Working with your downloaded transactions

Step 1 Select each transaction that you want to add to your register. You can hold down the Command key and click additional transactions to select multiple transactions. If you make a mistake and want to deselect a transaction, click it again.

Step 2 Click **Accept** to record the selected transactions, or **Accept All** to record all transactions. The accepted items are added to your register, marked C (cleared) and removed from the transaction list.