Getting Started with Quicken® 2007 for Mac®

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

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

For step-by-step help with an online task, choose **Help** menu → **Quicken 2007 Help**.

This guide includes the following sections:

- **Downloading the Latest Quicken Update**—Describes the steps to download free product updates as they become available for your version of Quicken.
- **Setting up a Quicken Account for First Time Download**—Explains how to create a new Quicken account and download transactions.
- **Keeping your Quicken Accounts up to Date**—Explains how to download transactions or send payments with accounts that you have activated for online account services.

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.

DOWNLOADING THE LATEST QUICKEN UPDATE

1. Choose **Quicken 2007** menu → **Check for Updates**.
2. Follow the on-screen instructions.

SETTING UP A QUICKEN ACCOUNT FOR FIRST TIME DOWNLOAD

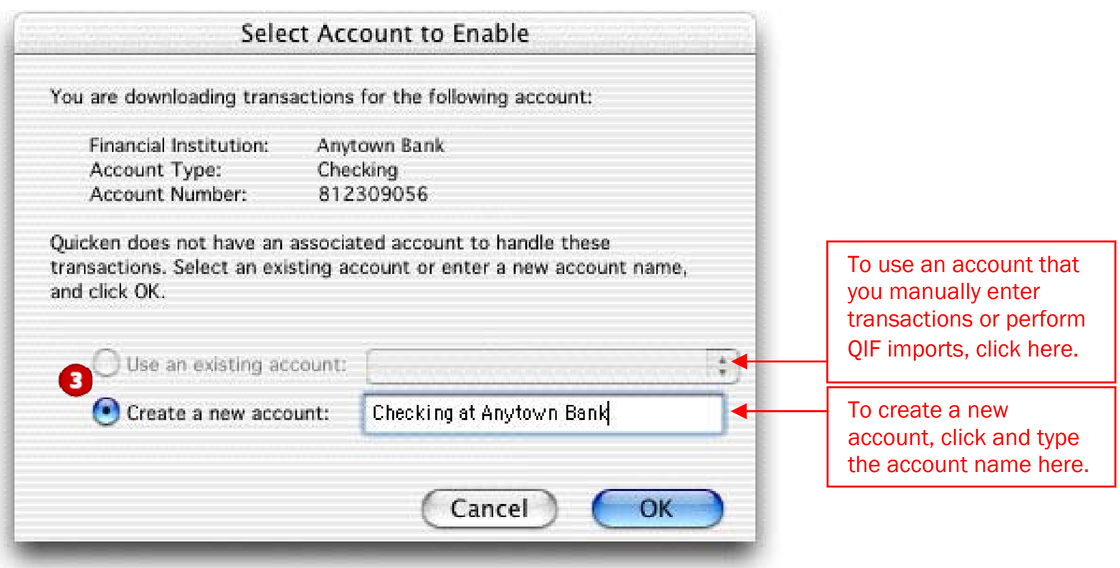
The following steps explain how to activate your existing Quicken account(s) or create one or more new Quicken accounts for Web Connect online access.

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.**

2. When you click **Download to Quicken**, your browser may prompt you to open or save files. If this prompt appears, click **Open** and follow the on-screen instructions.

3. To set up a new account in Quicken, click **Create a new account**, and type a name for the account. Then click **OK**.

   Or, to select an account that you have been using to manually enter transactions, click **Use an existing account**, and select the existing account from the drop-down list. Click **OK**.



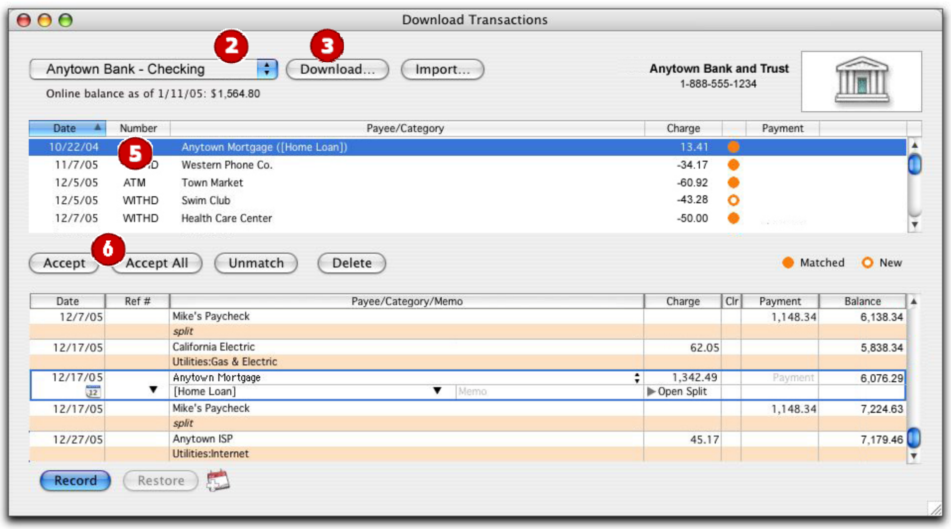
Your downloaded transactions are displayed in the Download Transactions window.

Note: You only need to select the account for this first download. After the account is activated for Web Connect account access, future downloads download to this account automatically.

KEEPING YOUR QUICKEN ACCOUNTS UP TO DATE

Downloading New Transactions

1. Choose **Online** menu → **Download Transactions**.
2. Choose the account name from the account pop-up menu.
3. Click **Download**. Quicken launches your default browser and takes you to Bank Forward's web site.
4. Log in to your financial institution's Web site and download the transactions into Quicken. Quicken automatically displays the downloaded data in the Download Transactions window.



Working with your Downloaded Transactions

5. Click to select each transaction that you want to add in your register. You can hold down the **SHIFT** key and click additional transactions to select multiple transactions. If you make a mistake and want to deselect a transaction, click it again.
6. 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.

CONGRATULATIONS, YOU ARE SET UP AND READY TO USE QUICKEN!

If you have any questions regarding these instructions, you may contact us at 701-845-1220 or 1-888-841-4783. A customer service representative will be available to assist you from **8:00 A.M. to 5:00 P.M. Monday – Friday.** You may also visit **Bank Forward's** Web site at **www.bankforward.com** or refer to: http://www.intuit.com/support/quicken.