Getting Started with Quicken® 2007 for Windows®

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

Before you can download your transactions with Quicken, you need Internet access, your customer ID, and your password. To complete Quicken account setup, you need to log into the **Bank Forward** Web site: www.bankforward.com.

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.
- **Creating a New Quicken Account**—Explains how to use Express Setup to create a new Quicken account and download transactions.
- **Keeping your Quicken Accounts up to Date**—Explains how to download transactions on an ongoing basis.
- **Automating your Web Connect Downloads (optional)**—Explains how to activate the One Step Update feature.

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

DOWNLOADINGING THE LATEST QUICKEN UPDATE

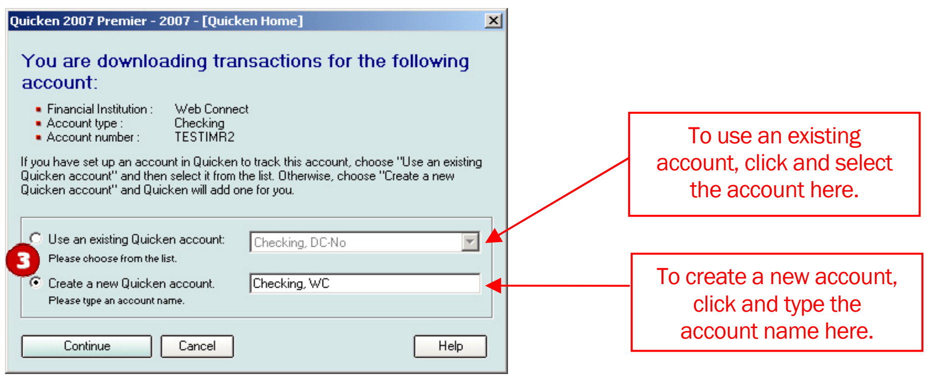
1. Click the **Update** icon on the Quicken toolbar.
2. Uncheck all boxes, and click **Update Now** in the One Step Update Settings dialog.
3. If an update is available, then Quicken provides a description of the update and brief instructions for downloading the update.
4. When the update completes,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

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 **Export**, 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 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**.



4. If the Rename Your Payees window appears, take the desired action:

   - To accept the default name change of one or more payees, check the box next to each payee name.
   - To change the payee name to a name other than the default, check the box next to the payee name, click **Edit**, and follow the on-screen instructions.
   - To leave a payee name unchanged, do not check the box next to it.

   To apply your payee name changes, click **Apply Settings**.

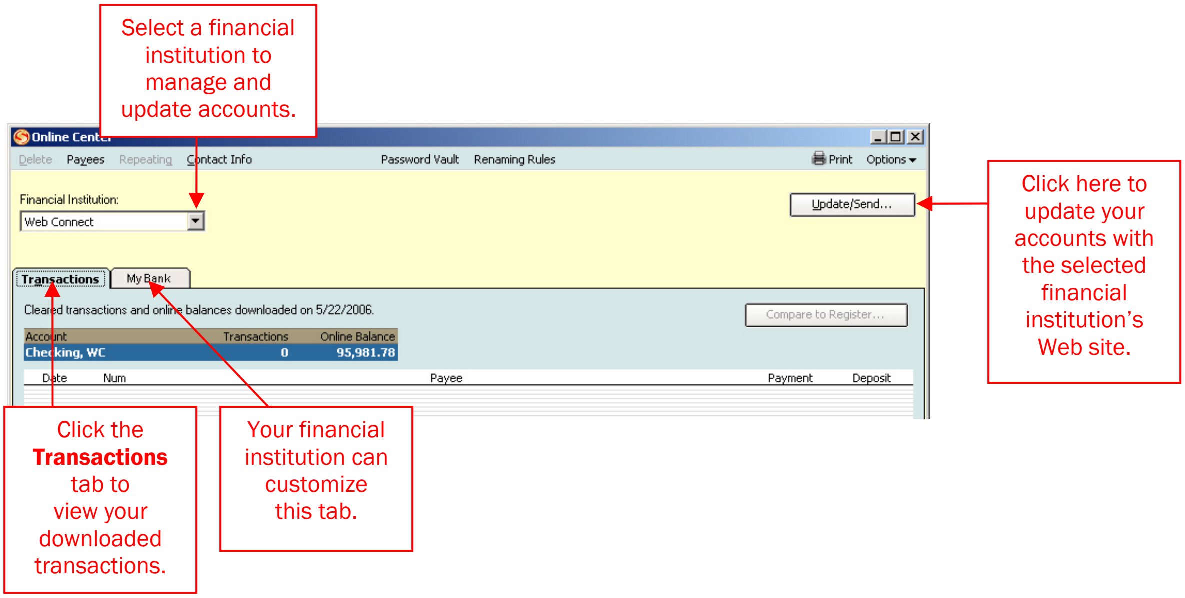
   Or, to exit this window without making changes, click **Cancel**.

5. Quicken confirms that your account setup and download were successful in the One Step Update Summary. Click **Close**.

KEEPING YOUR QUICKEN ACCOUNTS UP TO DATE

The Online Center provides an easy way to download transactions into the accounts that you have activated for online account services.

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



AUTOMATING YOUR WEB CONNECT DOWNLOADS (OPTIONAL)

Express Web Connect provides the option of activating the One Step Update feature, which automates the downloading of Web Connect data. To activate the One Step Update feature, take either of these actions:

- If you see the Activate One Step Update prompt during the Web Connect download process, click **Yes**, and then click **Activate**.
- From Quicken, choose **Online** menu → **One Step Update**. In the dialog that displays, choose **Activate One Step Update** link next to **Bank Forward.**

Once activated, you can choose **Online** menu → **One Step Update** to perform downloads.

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 the **Bank Forward** Web site at **www.bankforward.com,** or refer to: http://www.intuit.com/support/quicken.