# Getting Started with Quicken® 2007-2008 for Windows®

BANK FORWARD

Member FDIC

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 for downloading 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.

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**.

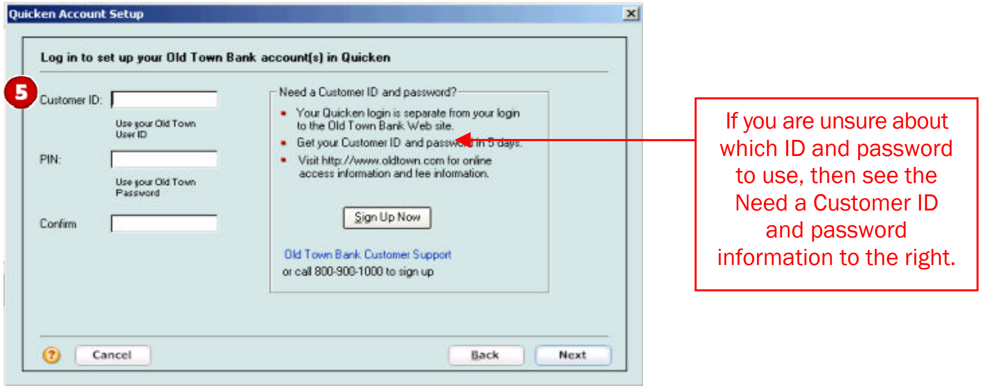
## DOWNLOADING THE LATEST QUICKEN UPDATE

Update

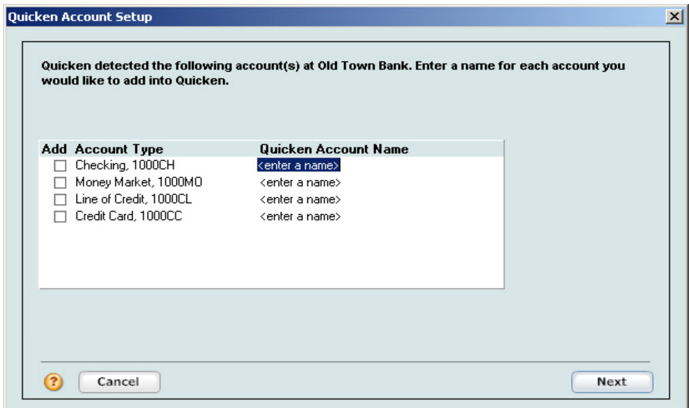
1. Click the **Update** icon on the Quicken toolbar.
2. Uncheck all boxes, and click **Update Now** in the One Step Update Settings dialog.
3. If an update is available, then Quicken provides a description of the update and brief instructions for downloading the update.
4. When the update completes,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

## CREATING A NEW QUICKEN ACCOUNT

1. Choose **Cash Flow** menu → **Cash Flow Accounts** → **Add Account**.
2. In the This account is held at the following institution: field, enter **Bank Forward**, and click **Next**.
3. If the Select Bank Location dialog displays, then choose your location from the list, and click **OK**.
4. With **Yes** selected to connect to your FI through Quicken, click **Next**.
5. Enter your customer ID and password. Enter your password again to confirm it. Click **Next**.




6. All downloadable Quicken accounts display. You can customize the Quicken Account Name for each account by typing directly in the field. Click **Next**.




7. Click **Done** to confirm that the accounts in the list are the ones that you wish to set up.
8. If the Rename Your Payees windows displays after the download, then do one of the following:
   - To accept the default name change of one or more payees, check the box next to each payee.
   - To enter a different payee name, check the appropriate payee name, click **Edit**, and follow the on-screen instructions.
   - To leave a payee name unchanged, do not check it.

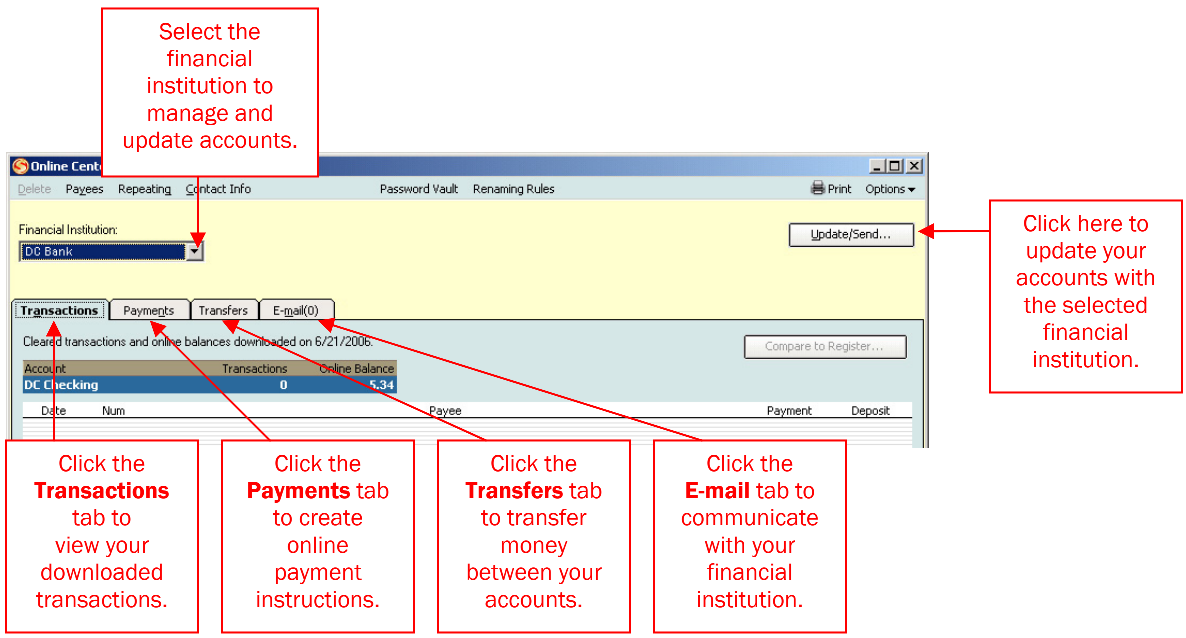
   To apply the payee name changes, click **Apply Settings**. Or, to exit this window with out making changes, click **Cancel**.
9. Review your One Step Update Summary page. Click **Close**.

# KEEPING YOUR QUICKEN ACCOUNTS UP TO DATE

### Update Accounts from the Online Center

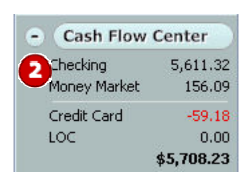
The Online Center provides additional functions. Within the Online Center, you can easily download transactions to, send payments from, or transfer money between the accounts that you have activated for online account services, depending upon which options your financial institution supports.

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





**Tip:** To update all of your accounts at once, choose **Online** menu → **One Step Update**. Then enter your password in the One Step Update Settings dialog, and click **Update Now**.




**2.** When the update completes, Quicken displays your transactions at **Bank Forward**. To open your account register, click the appropriate account under the Cash Flow Center, located at the left of the Quicken application.

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

If you have any questions regarding these instructions, you may contact us at **701-251-2040** or **1-800-450-3115**. A customer service representative will be available to assist you from **8:00A.M. to 5:00P.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.