



Member FDIC

Quicken for Mac Conversion Instructions

Express Web Connect

INTRODUCTION

As **BANK FORWARD** completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive

To complete these instructions, you will need your login credentials for online banking.

NOTE **QUICKEN EXPRESS WEB CONNECT** uses the same User ID and Password as your financial instruction's website.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes.

DOCUMENTATION AND PROCEDURES

TASK 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **HELP** menu > **SEARCH**. Search for **BACKING UP DATA FILES**, and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **HELP** menu > **SEARCH**. Search for **UPDATE**, select "**CHECK FOR UPDATES**," and follow the instructions.

TASK 2: Optional task - Complete a final download before 10/06/20

1. Select your account under the **ACCOUNTS** list on the left side.
2. Choose **ACCOUNTS** menu > **UPDATE SELECTED ONLINE ACCOUNT**.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) you use for online banking or investing.

TASK 3: Disconnect Accounts in Quicken on/after 10/06/2020

1. Select your account under the **ACCOUNTS** list on the left side.
2. Choose **ACCOUNTS** menu > **SETTINGS**.
3. Select **SET UP TRANSACTION DOWNLOAD**.
4. Enter **BANK FORWARD** in the **SEARCH** field, select the name in the **RESULTS** list and click **CONTINUE**.

TASK 4: Reconnect Accounts on/after 10/13/2020

1. Select your account under the **ACCOUNTS** list on the left side.
2. Choose **ACCOUNTS** menu > **SETTINGS**.
3. Select **SET UP TRANSACTION DOWNLOAD**.
4. Enter **BANK FORWARD** in the Search field, select the name in the Results list and click Continue.
5. Enter your **USER ID** and **PASSWORD** and click **CONTINUE**.
6. If the bank requires extra information, enter it to continue.

NOTE

Select "**EXPRESS WEB CONNECT**" or "**QUICKEN CONNECT**" for the "Connection Type" if prompted.

7. In the "**ACCOUNTS FOUND**" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **ACTION** column, select "**LINK**" to pick your existing account.

IMPORTANT

In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, select "Link" to pick your existing account.

8. Select **FINISH**.