



# Quicken for Mac Conversion Instructions

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*Web Connect to Direct Connect*

## Introduction

As **Forward Bank** completes its digital upgrade, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates listed with each task as this information is time sensitive.

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

**NOTE:** **Web Connect** uses the same User ID and Password as the **Forward Bank** website. **Direct Connect** may require registration. Please contact **Forward Bank** to verify your Direct Connect login information.

Make sure to complete the following instructions as described and in the order presented. If the order is not followed, your online banking connection may not function properly. This conversion should take 15-30 minutes.

*Thank you for making these important changes and moving Forward with us!*

## Documentation and Procedures

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### Task 1: Conversion Preparation

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1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up**, select **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 **Updates**, select "Check for Updates," and follow the instructions.

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### Task 2: Connect Accounts to **Forward Bank** on or after **07/20/2020**

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1. Select your account in the **Accounts** list on the left sidebar.

2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download**.
4. Enter **Forward Bank** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
5. Enter your Direct Connect **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

**NOTE:** Select "Direct Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, associate each new account to accounts in your Quicken data file. Under the **Action** column, select "**Link**" to pick your existing account. When complete, click Finish.

**IMPORTANT:** Do **NOT** select "**ADD**" under the action column unless you intend to add a new account to Quicken.