



Quicken for Mac 2007 Upgrade Instructions

Web Connect to Direct Connect

Introduction

As **Forward Financial Bank** completes its system upgrade 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 User ID and Password for both the old Online Banking system and the newly upgraded Online Banking system for Forward Financial Bank.

NOTE: **Web Connect** uses the same User ID and Password as the **Forward Financial Bank** website. **Direct Connect** may require registration. Please login to Forward Financial Bank's website www.forward.bank on or after June 19 to establish your credentials prior to completing the Quicken process.

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**, select **Backing Up Your Data**, 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.
3. Repeat the download process for each account you have (such as checking, savings, credit cards and brokerage).

4. Once all accounts have been downloaded, accept all transactions into your Quicken account registers.

Task 2: Disconnect Accounts At *Forward Financial Bank* on or after **06/19/2017**

1. Choose **Lists** menu > **Accounts**.
2. Select the account to deactivate and click **Edit**.
3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
4. Remove the information within the **Account Number** and **Routing Number** fields.
5. Click **OK** to save your edits.
6. Repeat steps for each account to be disconnected.
7. Verify your account list does not display a blue online circle icon for the accounts you are disconnecting.

Task 3: Reconnect Accounts to *Forward Financial Bank* on or after **06/19/2017**

1. Choose **Lists** menu > **Accounts**.
2. Select your first disabled account and click **Edit**.
3. Click the **Financial Institution** drop-down list and select **Change Financial Institution**.
4. Click on **Update List**.
5. In the **Financial Institutions** dialog, enter, then select *Forward Financial Bank* from the list and click **Use**.
6. Enter your Direct Connect **User ID** and **Password**. Click **OK**.
7. In the **Add Online Services** dialog, match your first account to the appropriate account number. Click **OK**.

NOTE: Each account will be displayed below **"Use an existing account."**

8. Click **OK**.
9. Click OK to close the **Edit Register** page.
10. Choose **Lists** menu > **Accounts**. Verify that each account you are reconnecting has a blue online circle for online services.