



# Quicken for Mac 2015-2017 Upgrade Instructions

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*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](http://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

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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 Financial Bank* on or after **06/19/2017**

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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 Financial 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.