Quicken for Mac
Conversion Instructions

Express Web Connect to Web 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.

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

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 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.

Task 2: Disconnect Accounts in Quicken on or after *07/20/2020*

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Settings**.

3. Select **Troubleshooting** > **Deactivate Downloads**.

4. Repeat steps for each account to be disconnected.

Task 3: Reconnect Accounts to *Forward Bank* on or after *07/20/2020*

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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 *Forward Bank* in the **Search** field, select the name in the **Results** list and click **Continue**.

5. Log in to https://www.forward.bank/ **Download** a file of your transactions to your computer.

> **NOTE:** Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

6. Drag and drop the downloaded file into the box **Drop download file**.

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

8. Click **Finish**.

9. Repeat steps for each account to be reconnected.