Quicken for Windows Conversion Instructions

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 Your Data*** and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for ***Update Software*** and follow the instructions.

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

1. Choose **Tools** menu > **Account List**.

2. Click the **Edit** button of the account you want to deactivate.

3. In the **Account Details** dialog, click on the **Online Services** tab.

4. Click **Deactivate**. Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. 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. Download your Quicken Web Connect file from https://www.forward.bank/.

NOTE:	Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

2. Click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.
3. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

IMPORTANT:	Do **NOT** select **Create a new account** unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.

4. Repeat steps for each account to be reconnected.