Quicken 2017 for Mac Getting Started Guide for Financial Institutions

Financial Institution Support – OFX Connectivity Group

Table of Contents

Quicken 2017 for macOS
Getting Started Guide

Thank you for choosing Quicken!

About this Guide

This guide helps you get started with Quicken 2017 as quickly as possible. You'll learn:

- What you will need to get started
- How to set up an account for online banking (Direct Connect)
- How to set up an account for online banking (Web Connect & Express Web Connect)
- How to update an account setup for online banking
- How to set up Bill Pay (Direct Connect-only)

New in Quicken 2017 for macOS

Quicken 2017 maintains the same online banking connectivity features, along with some new features not found on previous versions.

- Mobile Investments
- Quicken Bill Pay
- Feature Bar with animation descriptions
- Updated Sidebar with eliminated icons and updated fonts. The sidebar can be customized.
- New Reports

Connect and Update your Data

Before you set Quicken to download transactions you may need to contact your financial institution (FI) for the following information:

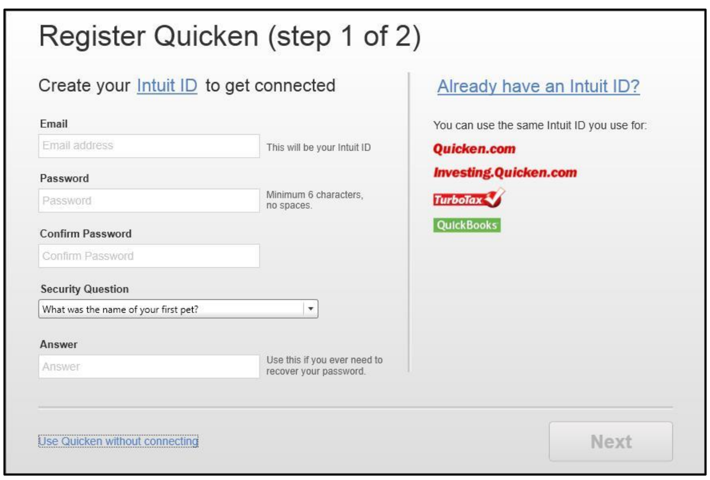
- Customer ID
- Personal Identification Number (PIN) or password

For Quicken Web Connect/Express Web Connect accounts, use the same customer ID and PIN/password as your financial institution website. For Direct Connect, they may be different. Please contact your financial institution to verify your Direct Connect login information.

IMPORTANT:	We recommend that you back up your Quicken Data File before setting up online banking accounts for the first time. Choose **Help > Quicken Help** and search for **Back Up** for backup instructions.

Register a Quicken Data File with an Intuit ID

When you set up an account for online banking, Quicken requires you to register your Quicken data file with an Intuit ID. If you already use other Intuit products, like TurboTax or QuickBooks, you may already have an Intuit ID.



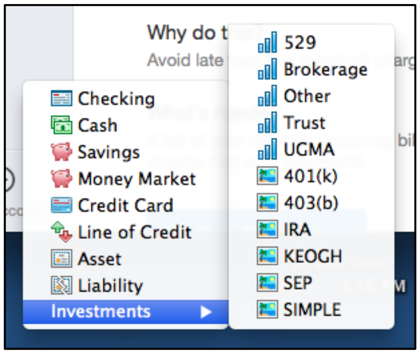
Fill in the information to set up your Intuit ID and complete your registration

If you already have an Intuit ID, click "Already have an Intuit ID" on the right and sign in to complete your registration

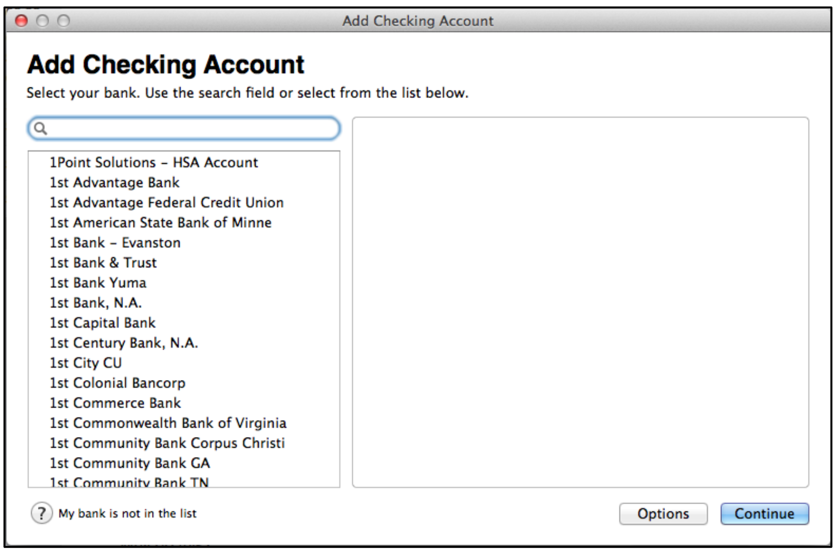
Set Up an Account for Online Banking (Direct Connect)

1. Choose **Tools > Add Account...**

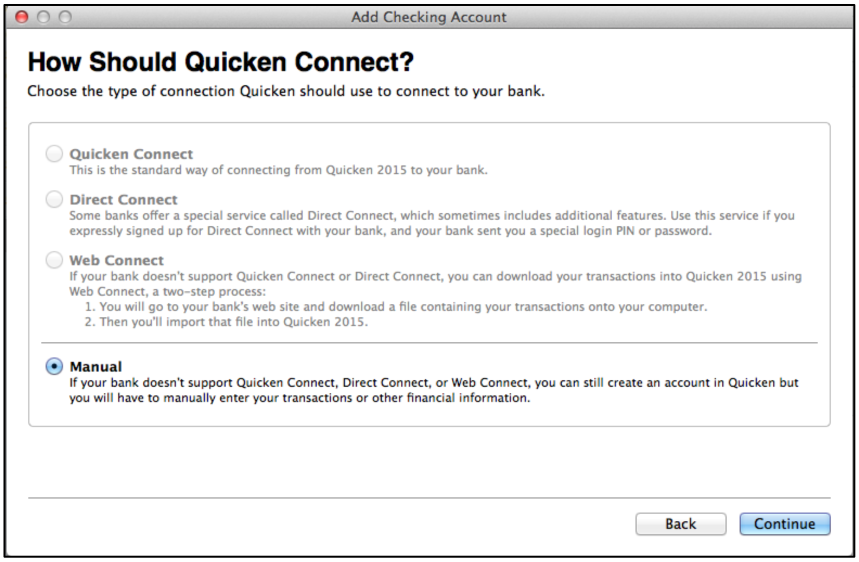
2. Click the type of account you want to set up. For example, you can choose a specific investment type if you wish



3. After you choose the type of account you want to add, you will see the financial institution selection screen. Type the name of your financial institution to filter the list.



4. When your financial institution name appears in the filter results, click your financial institution's listing and and then click **Options** to see the connectivity selection screen.



NOTE: Be sure to select the correct financial institution, because some financial institutions may appear more than once. If you have any questions about which listing to choose for Direct Connect, please contact your financial institution.

5. In the connectivity selection screen, select **Direct Connect** and click **Continue**.

6. Quicken will now display a login screen: type your Direct Connect credentials and follow the prompts to add your accounts to Quicken 2017.

Set Up an Account for Online Banking (Web Connect)

1. Log into your financial institution's web site.

2. Download your transactions according to your financial institution's instructions.

3. If you are given a choice for your download format, choose "Quicken Web Connect (*.QFX)" and save the file to your computer.

NOTE: These instructions assume you will save the download to your computer. If you "open" it instead, your web browser should open Quicken and begin to import the transactions. If you plan to open the file directly, we recommend that you have your Quicken data file open in Quicken 2017 before you begin Step 2.

4. Open Quicken, then choose **File** > **Import** > **Bank or Brokerage File (OFX, QFX)….** You will see a navigation window.

5. Navigate to the file you downloaded in Step 2, then click Open.

6. Click **Link an Existing Account** if you have an appropriate account in the account list. If you don't have an account yet, click **Create a new account** and enter a nickname for that account.

7. Click **Import**.

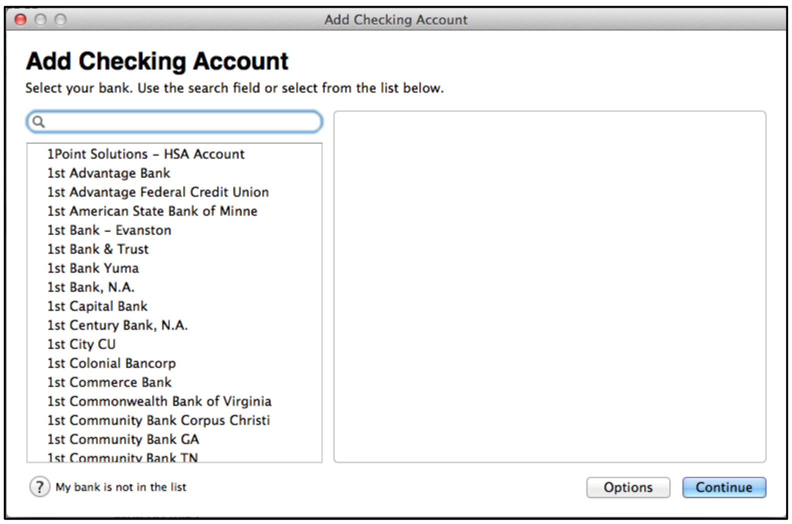
8. Click OK to confirm and finish.

Set Up an Account for Online Banking (Quicken Connect)

1. Click Add Account on the sidebar.

2. Choose the type of account you want to set up.

3. After you select the type the name of account you want to add, you will see the financial institution selection screen. Type the name of your financial institution to filter the list.



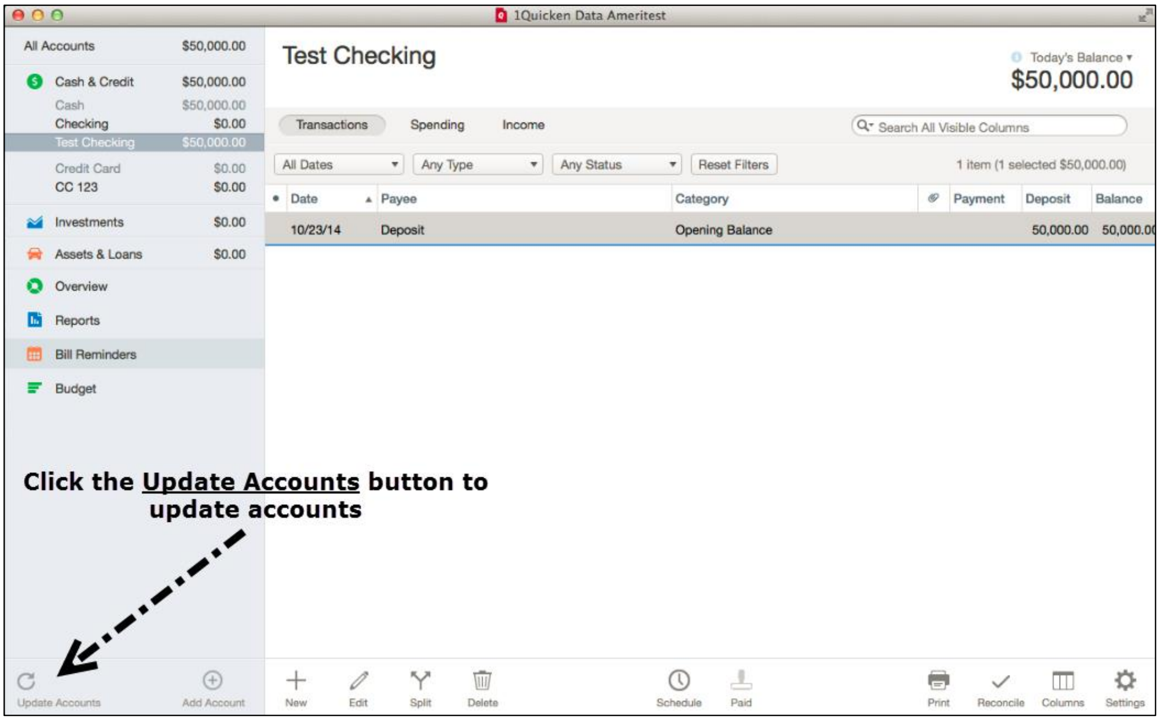
4. When you see your financial institution's name in the filter results, click it, and click **Continue**.

5. Quicken will now display a login screen: type the credentials you use to log in to your financial institution's website and follow the prompts to add your accounts to Quicken 2017.

NOTE:	During the Quicken Connect setup, you might be asked to enter your Multi-Factor Authentication information. This could be a series of security questions, a one-time passcode, etc.

Updating Accounts: The One Step Update

After an account has been set up for online banking, you can use update your account data and information very easily. Just click Update Accounts.



Set Up Bill Pay (Direct Connect)

Some financial institutions offer Direct Connect subscribers the ability to send payments directly from within Quicken. If your financial institution offers Bill Pay services, this feature is turned on during the Direct Connect account setup.

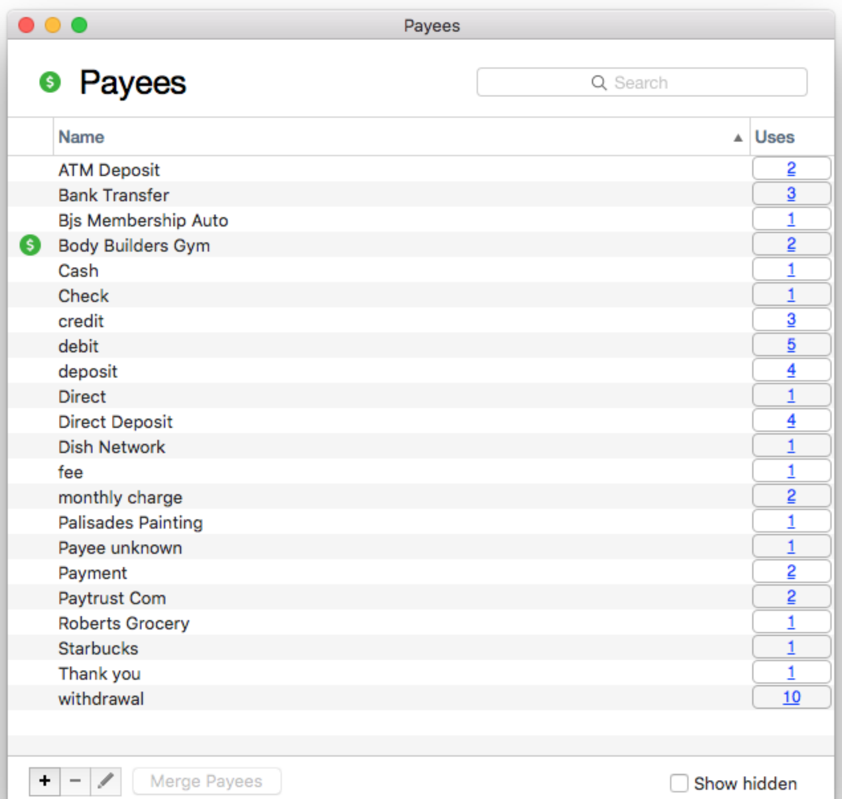
This section assumes that you have already activated Direct Connect Bill Pay.

> **NOTE:** Contact your financial institution if you have any questions about Bill Pay enrollment processes and capabilities.

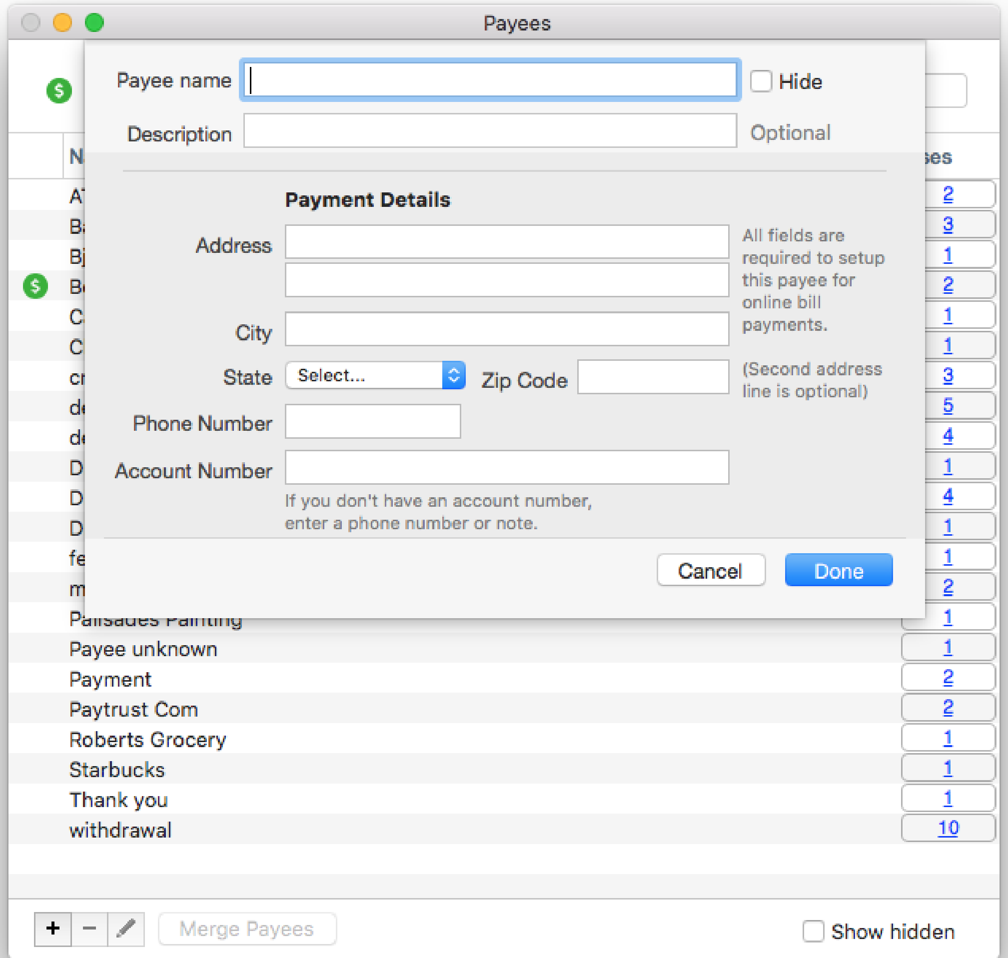
Adding an Online Payee

Sending online payments with Quicken is a fast and easy way to pay your bills. Just add the payment to the Online Payee List once; all Quicken accounts share this list.

1. Choose Window > Payees or press CMD-Shift-E.



2. Click Add Payee (the + sign) at the bottom left. You'll see the Add Payee sheet.



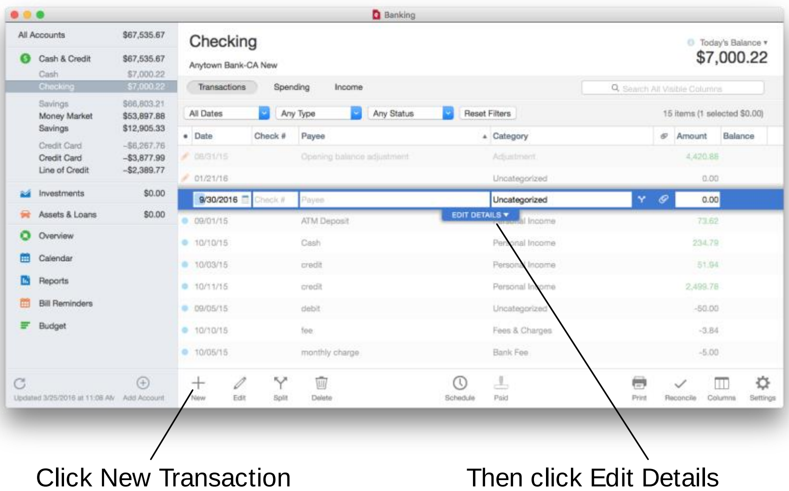
3. In the Add Payee sheet, enter your payee's contact and account information, then click Done.

Now you can send a payment to the Payee.

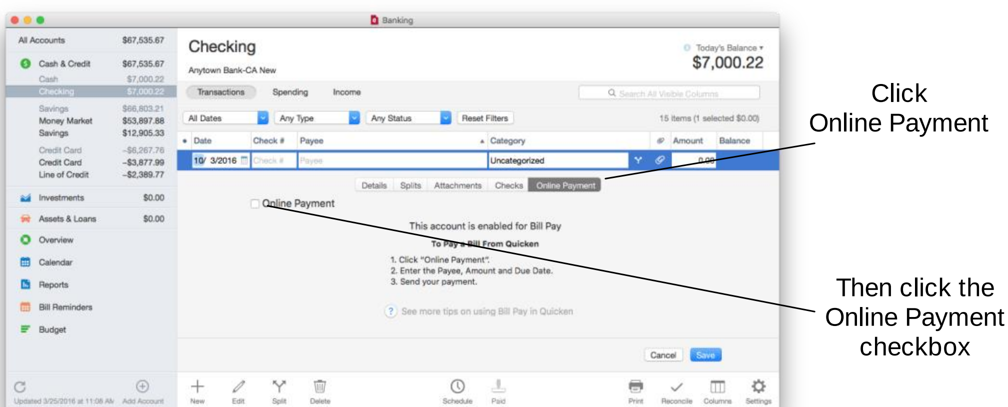
Creating an Online Payment

After you have added your online payees, you are ready to create an online bill payment.

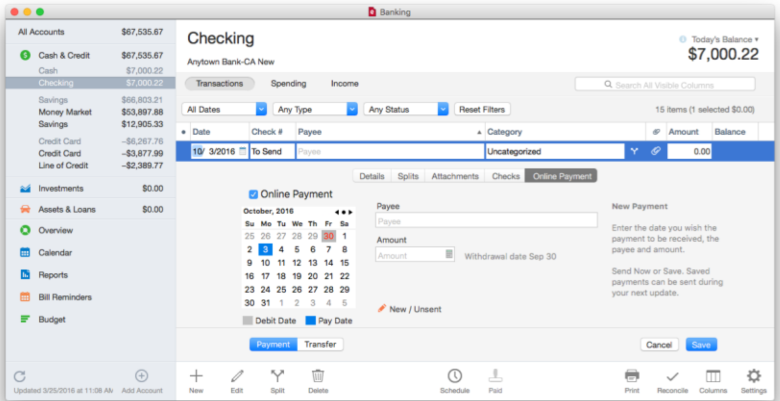
1. Click "New Transaction.
2. Click Edit Details.



3. In the Details panel, click Online Payments, then click the Online Payment checkbox.



The online payment panel will appear.



4. Choose the payment date, enter your payee information and the amount, and click Save.