

Connectivity Getting Started Guide Quicken for Mac

Intuit Financial Data Platform Professional Services Group

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Quicken for MAC Getting Started Guide

Thank you for choosing Quicken!

About this Guide

This guide helps you get started with Quicken 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)

Features in Quicken for MAC

Quicken maintains the same online banking connectivity features, along with these notable features:

- Manage money on the go across desktop + web + mobile
- Bill center dashboard and PDF download of bills
- Improved loan principal and interest tracking for faster payoff
- Loan what-if analysis has the ability to vary payment scenarios
- Customizable investment portfolio view with IRR & ROI
- Specific log assignments to optimize taxes on investment sales

Before you Connect

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

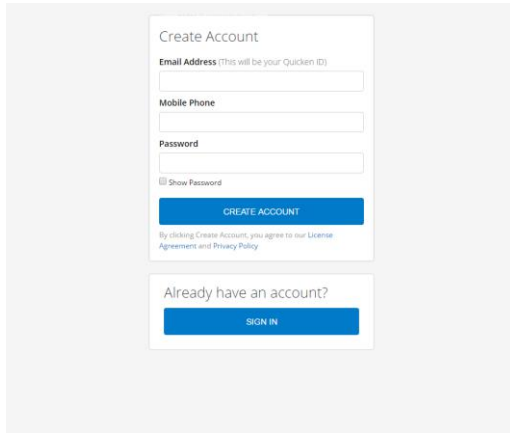
- Customer ID
- Personal Identification Number (PIN) or password

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.

Link Your Quicken Data File to Your Quicken ID

When you set up an account for online banking, Quicken requires you to link your Quicken data file to a Quicken ID. If you don't currently have a Quicken ID, you will need to create one.



The image shows a 'Create Account' form with the following fields and options:

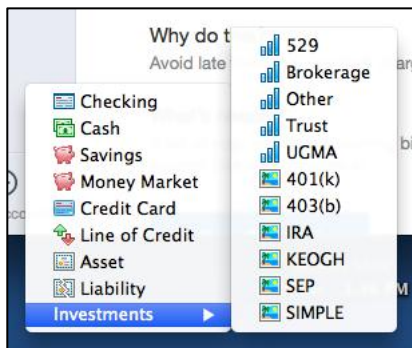
- Create Account** (Section Header)
- Email Address** (This will be your Quicken ID) - Input field
- Mobile Phone** - Input field
- Password** - Input field
- Show Password
- CREATE ACCOUNT** (Blue Button)
- By clicking Create Account, you agree to our License Agreement and Privacy Policy.
- Already have an account?** - Section Header
- SIGN IN** (Blue Button)

Fill in the information to set up your Quicken ID and link your data file.

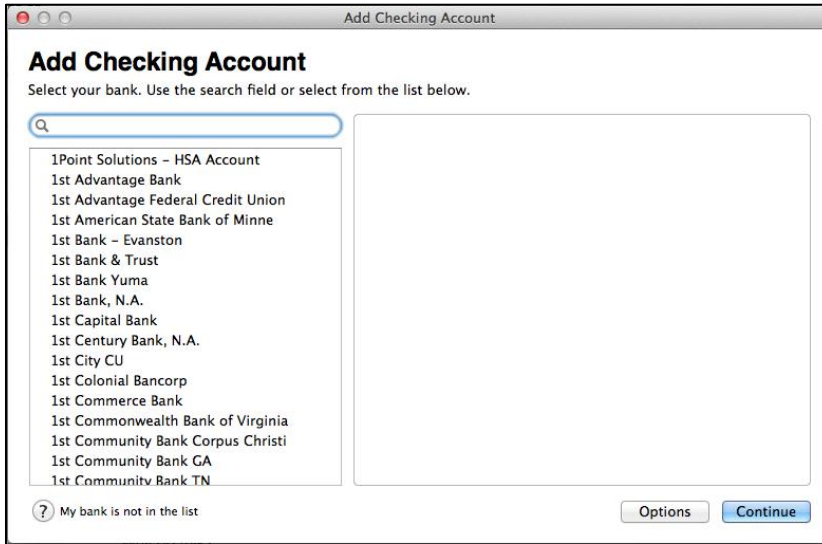
If you already have a Quicken ID, click "SIGN IN" under "Already have an account?" and sign in.

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.

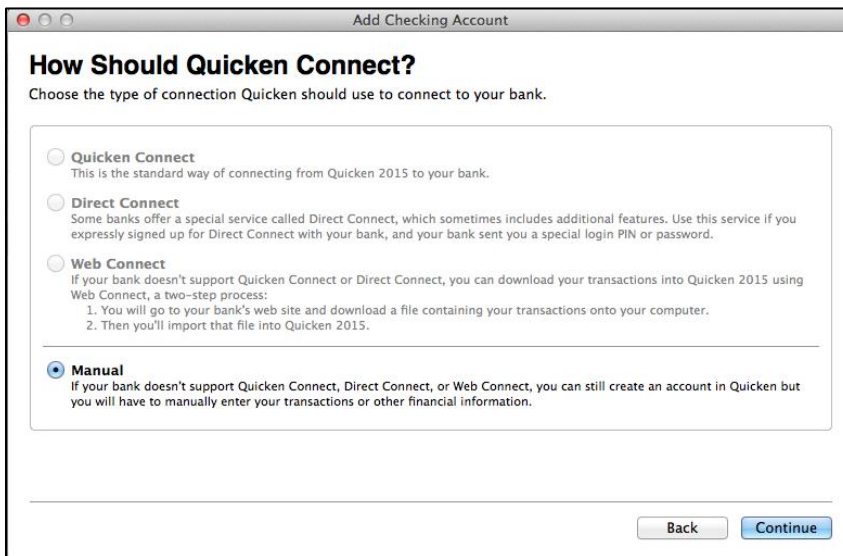


3. After you choose the type of account you want to add, you will see the financial institution selection screen. Type the name of your financial institution to filter the list.



The screenshot shows a window titled "Add Checking Account". Below the title is the instruction "Select your bank. Use the search field or select from the list below." There is a search input field with a magnifying glass icon. Below the search field is a list of banks, including "1Point Solutions – HSA Account", "1st Advantage Bank", "1st Advantage Federal Credit Union", "1st American State Bank of Minne", "1st Bank – Evanston", "1st Bank & Trust", "1st Bank Yuma", "1st Bank, N.A.", "1st Capital Bank", "1st Century Bank, N.A.", "1st City CU", "1st Colonial Bancorp", "1st Commerce Bank", "1st Commonwealth Bank of Virginia", "1st Community Bank Corpus Christi", "1st Community Bank GA", and "1st Community Bank TN". At the bottom left, there is a link that says "? My bank is not in the list". At the bottom right, there are two buttons: "Options" and "Continue".

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



The screenshot shows a window titled "Add Checking Account" with the sub-header "How Should Quicken Connect?". Below the sub-header is the instruction "Choose the type of connection Quicken should use to connect to your bank." There are four radio button options: "Quicken Connect" (with subtext "This is the standard way of connecting from Quicken 2015 to your bank."), "Direct Connect" (with subtext "Some banks offer a special service called Direct Connect, which sometimes includes additional features. Use this service if you expressly signed up for Direct Connect with your bank, and your bank sent you a special login PIN or password."), "Web Connect" (with subtext "If your bank doesn't support Quicken Connect or Direct Connect, you can download your transactions into Quicken 2015 using Web Connect, a two-step process: 1. You will go to your bank's web site and download a file containing your transactions onto your computer. 2. Then you'll import that file into Quicken 2015."), and "Manual" (which is selected, with subtext "If your bank doesn't support Quicken Connect, Direct Connect, or Web Connect, you can still create an account in Quicken but you will have to manually enter your transactions or other financial information."). At the bottom right, there are two buttons: "Back" and "Continue".

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. Enter your Direct Connect credentials and follow the prompts to add your accounts to Quicken.

Set Up an Account for Online Banking (Web Connect)

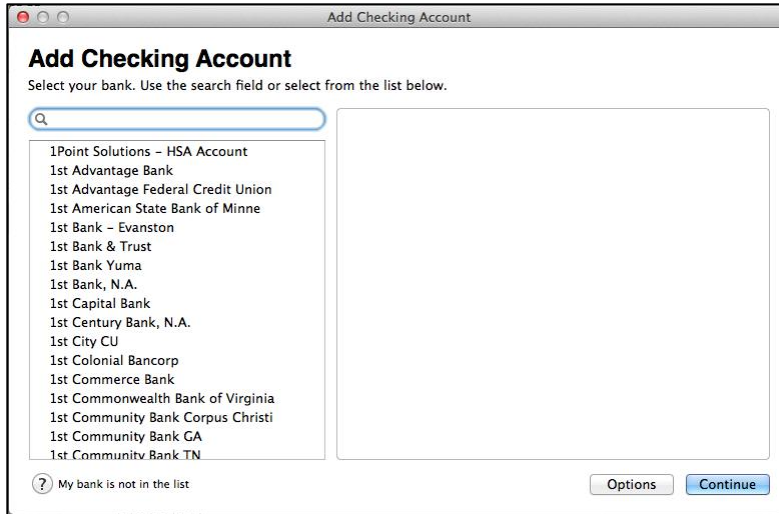
1. Log into your financial institution's web site.
2. Download your transactions according to your financial institution's instructions.
3. If you are given a choice for your download format, choose "Quicken Web Connect (*.QFX)" and save the file to your computer.

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 before you begin Step 2.

4. Open Quicken, then choose **File > Import > Bank or Brokerage File (OFX, QFX)...** You will see an import dialog.
5. Navigate to and select 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. Choose **Add Account** on the sidebar.
2. Select 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.

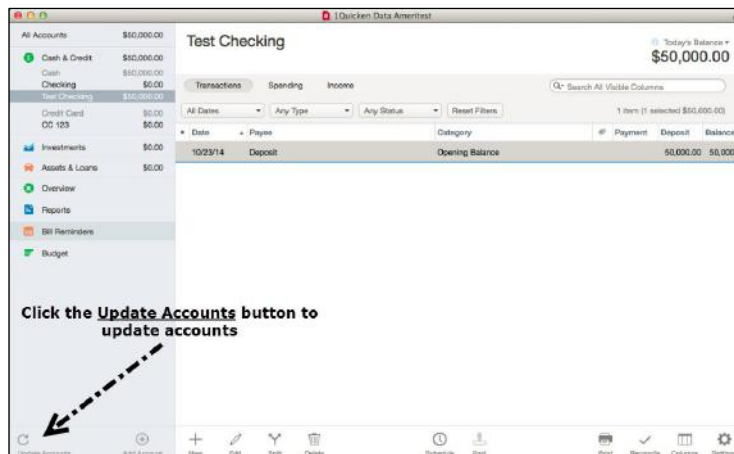


4. When you see your financial institution's name in the filter results, click it and click **Continue**.
5. Quicken will now display a login screen: type the credentials you use to log in to your financial institution's website and follow the prompts to add your accounts to Quicken 2019.

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 One Step Update to update information. Just click Update Accounts in the Quicken sidebar.



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 activated during the Direct Connect account setup.

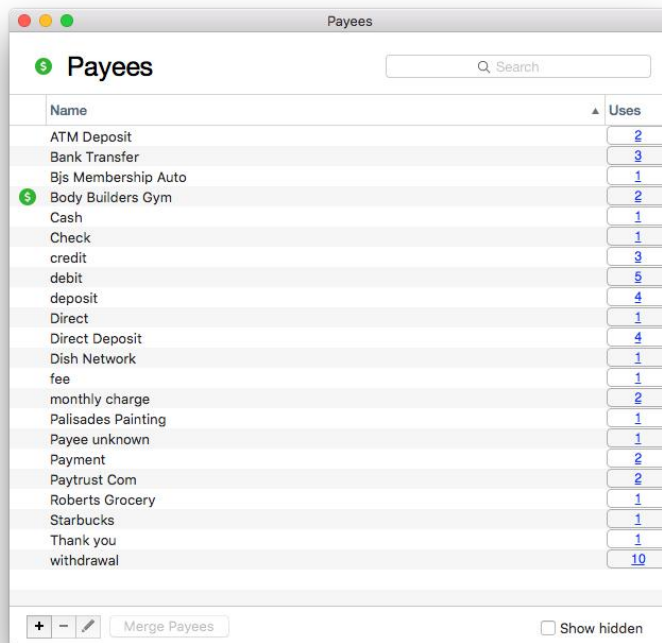
NOTE: Contact your financial institution if you have any questions about Bill Pay enrollment processes and capabilities.

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**.

You'll see your Payee List.



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

The screenshot shows a 'Payees' dialog box with the following fields and options:

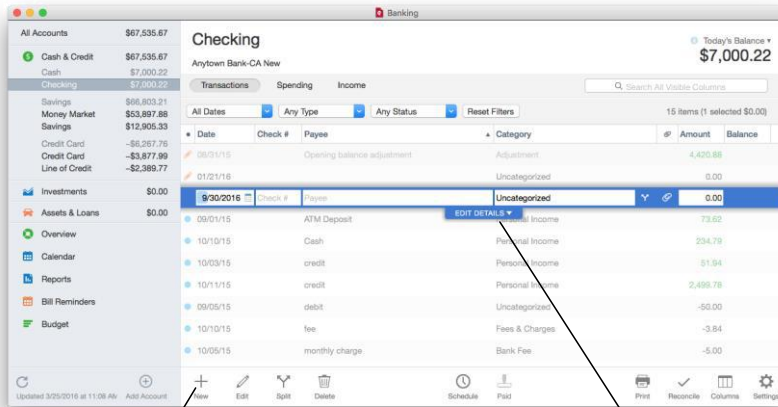
- Payee name:** A text input field with a blue border.
- Description:** A text input field.
- Optional:** A checkbox.
- Payment Details:** A section containing:
 - Address:** A text input field.
 - City:** A text input field.
 - State:** A dropdown menu with 'Select...' as the current selection.
 - Zip Code:** A text input field.
 - Phone Number:** A text input field.
 - Account Number:** A text input field.
- Buttons:** 'Cancel' and 'Done' buttons.
- Text:** 'All fields are required to setup this payee for online bill payments.' and 'If you don't have an account number, enter a phone number or note.'
- Right Panel:** A list of existing payees with a 'Count' column on the right. The list includes: 'Payee unknown' (1), 'Payment' (2), 'Paytrust Com' (2), 'Roberts Grocery' (1), 'Starbucks' (1), 'Thank you' (1), and 'withdrawal' (10).
- Bottom:** '+', '-', and edit icons, a 'Merge Payees' button, and a 'Show hidden' checkbox.

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.

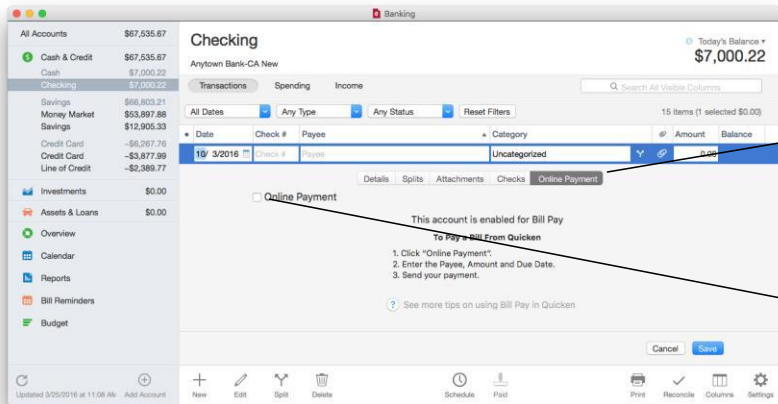
1. Click **New Transaction**.
2. Click **Edit Details**.



Click New Transaction

Then click Edit Details

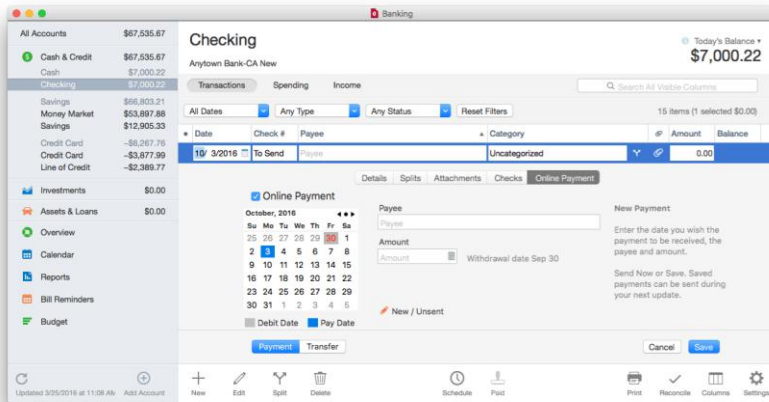
3. In the Details panel, click **Online Payments**, then click the **Online Payment** checkbox.



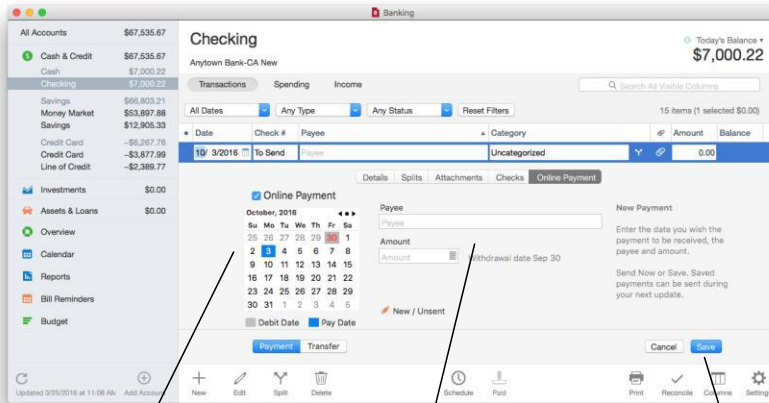
Click
Online Payment

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**.



Choose your payment date

Enter your Payee and the Amount

Then click Save