Quicken 2018 for macOS Getting Started Guide for Financial Institutions

Intuit OFX Connectivity Group – Financial Institution Support

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Quicken 2018 for macOS Getting Started Guide

Thank you for choosing Quicken!

About this Guide

This guide helps you get started with Quicken 2018 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 2018 for macOS

Quicken 2018 maintains the same online banking connectivity features, along with some new features not found on previous versions.

- A complete revamped investment portfolio view that provides over 25 different column customizations
- Improved loan tracking: Downloads, principal vs interest calculations, loan terms, and design
- Improved reports: More column addition, drill down on amounts for comparison, and Total Row
- Multi-Currency with download exchange rates from most countries and transfer between accounts of different currencies
- Mobile has a setup wizard to get started

Before you Connect

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

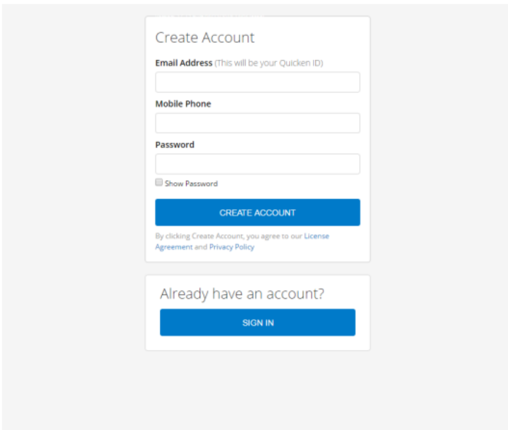
- Customer ID
- Personal Identification Number (PIN) or password

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.



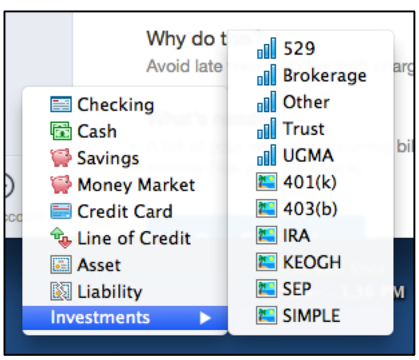
Fill in the information to set up your Quicken ID and link your data file.

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

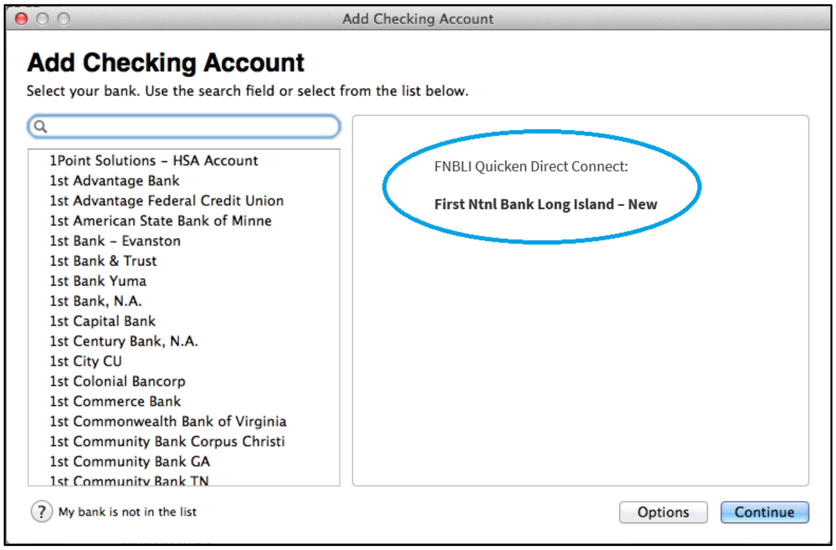
Set Up an Account for Online Banking (Direct Connect)

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

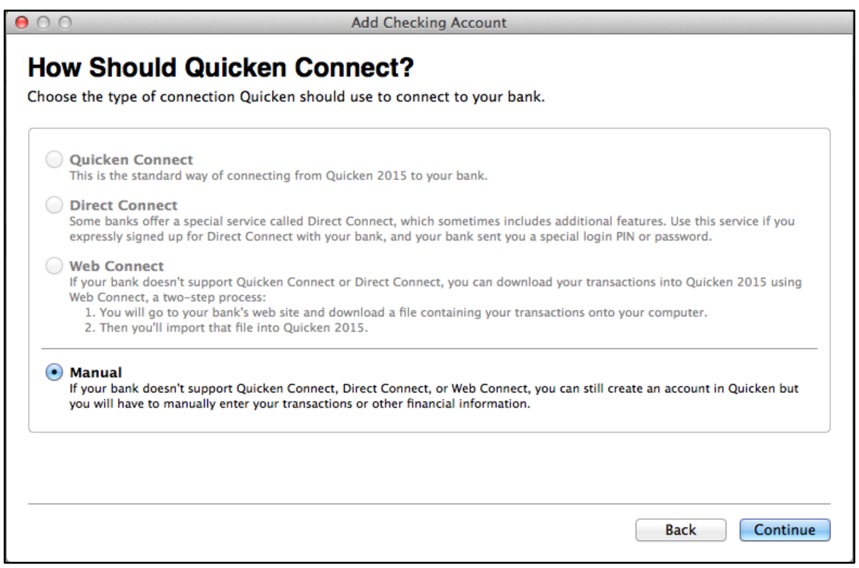
2. Click the type of account you want to set up.



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.



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.



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)

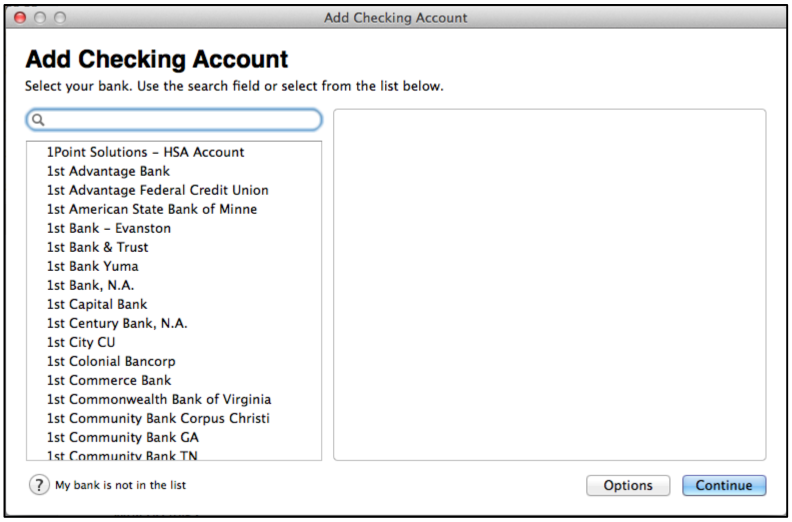
1. Log into your financial institution's web site.
2. Download your transactions according to your financial institution's instructions.
3. If you are given a choice for your download format, choose "Quicken Web Connect (*.QFX)" and save the file to your computer.

> **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 2018 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.



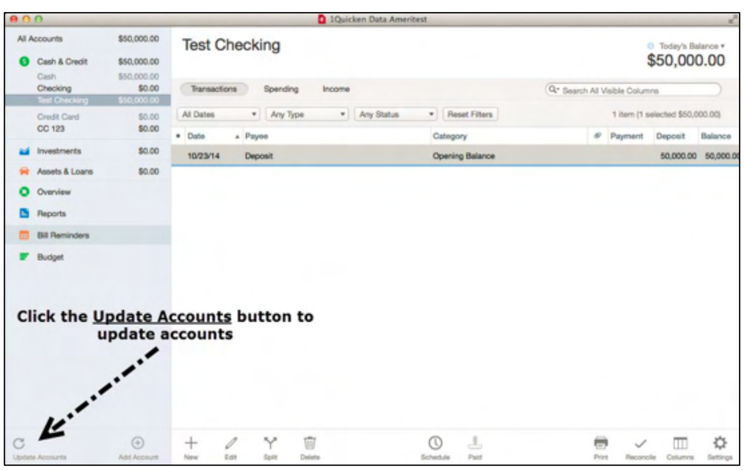
4. When you see your financial institution's name in the filter results, click it and click **Continue**.

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 2018.

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 turned on during the Direct Connect account setup.

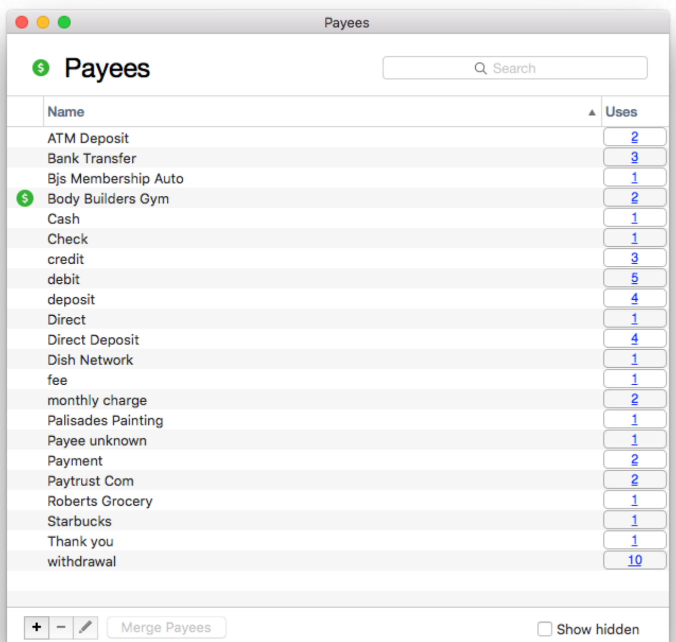
NOTE:	Contact your financial institution if you have any questions about Bill Pay enrollment processes and capabilities.

Adding an Online Payee

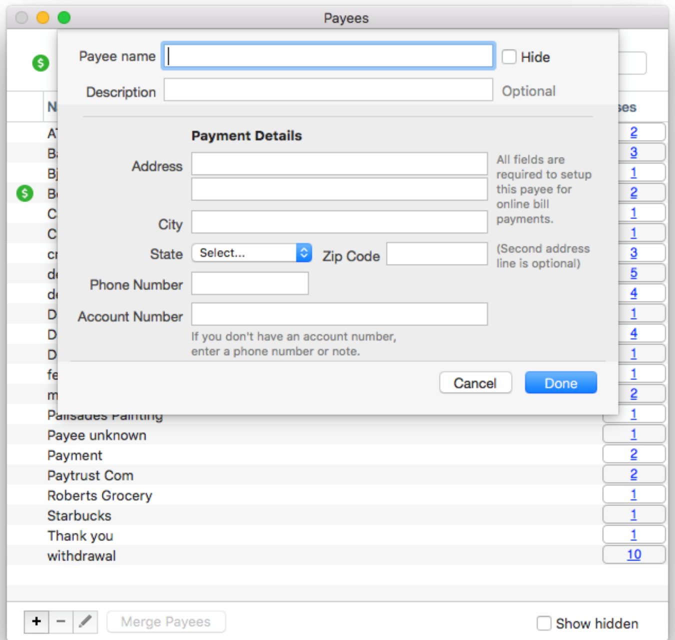
Sending online payments with Quicken is a fast and easy way to pay your bills. Just add the payment to the Online Payee List once; all Quicken accounts share this list.

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.



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

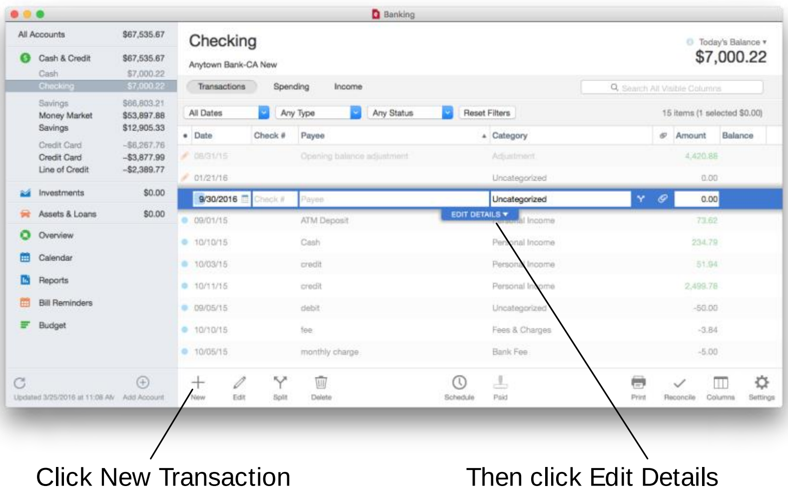
4. Now you can send a payment to the Payee.

Creating an Online Payment

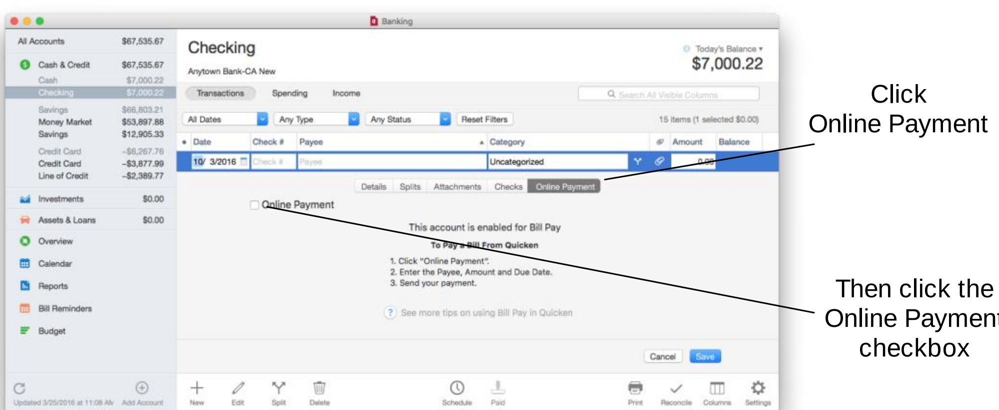
After you have added your online payees, you are ready to create an online bill payment.

1. Click New Transaction.

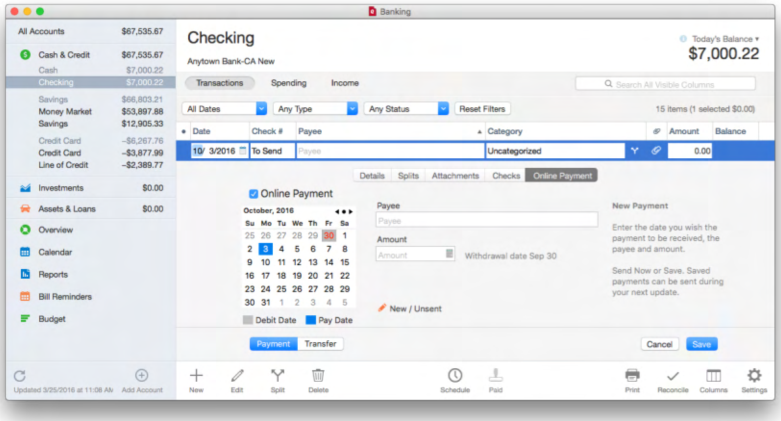
2. Click Edit Details.



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**.