



Quicken 2007 for Mac Getting Started Guide for Financial Institutions

Financial Institution Support – OFX Connectivity Group

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Quicken 2007 for Mac Getting Started Guide

Thank you for choosing Quicken!

About this Guide

This guide helps you get started with Quicken 2007 for Mac 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)
- How to update an account setup for online banking
- How to setup Bill Pay (Direct Connect-only)



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

NOTE: For Quicken 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.

You should back up your Quicken Data File before setting up your accounts for the first time. Go to the **Help** menu and type *Back Up* in the Search field for backup instructions.

Set Up an Account for Online Banking (Direct Connect)

1. Go to **File > New > Account...**
2. Choose your financial institution from the list.
3. You can filter the list by typing part of the name. When you see your financial institution name, click on it and click **Continue**.

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

4. Quicken will now display a login screen: type your Direct Connect credentials and follow the prompts to add your accounts to Quicken 2007 for Mac.

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.

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 2007 for Mac before you begin Step 2.

3. Open Quicken, then choose **File > Import > From Web Connect**.
4. Navigate to and select the file you downloaded in Step 2, then click **Open**.
5. 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.
6. Click **Import**.
7. Click **OK** to confirm and finish.

Updating Accounts: The One Step Update

After an account has been set up for online banking, regardless of the connectivity method, use this method to update an account with One Step Update:

1. Go to Tools > One Step Update...
2. Enter the necessary information for the listed accounts (such as passwords or user ID) and click Update Now.
3. Follow the instructions displayed by Quicken to update your 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.

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

Adding 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. Go to **Online > Payments > Online Payees**.
2. Click New and complete all the fields in the **Set Up Payee** dialog. Click **Create** when completed.
3. Review the information for accuracy and click **Yes**. If you need to make changes, click **No** and make your changes.

Creating an Online Payment

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

1. Go to **Online > Payments > Enter Payment**.
2. In the **Enter Online Payment** window, choose the payee you are trying to pay and enter the rest of the required information.
3. After the payment information has been entered, click **Put in Outbox**.
4. When you are ready to send the payment(s), go to **Online > Outbox** and click **Send Now**.
5. Follow the prompts to send the payment.