

GETTING STARTED WITH QUICKEN FOR MAC

First Colorado National Bank offers connectivity to Quicken for Mac through [Web Connect](#) and [Quicken Connect](#).

Prepare Quicken for your new Transaction File


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 instructions.

Web Connect

Download your Transaction File

- 1) Log into your online banking account at www.firstcoloradobank.com.
- 2) Click on the account of the transactions you'd like to download.
- 3) Click on the arrow with a line underneath.



Transactions		
INTEREST DEPOSIT	Dec 31, 2022	+\$0.02 \$145.13

- 4) Select the preferred date range for your download.
- 5) Select Quicken (*.QFX) as the file format.
- 6) Save the file to your computer.

Note: If you plan to open the file directly instead of saving it to your computer, we recommend that you have your data file open in Quicken *before* you begin. Then if you select "open" instead of "save", your web browser should open Quicken and begin to import the transactions.

Import Transactions to Quicken

- 1) Open Quicken and choose **File > Import > Bank or Brokerage File (OFX, QFX)**. This will open the import dialog.

- 2) Navigate to and select the file you downloaded, then click **Open**.
- 3) You will see a dialog box with options:
 - a. Click **Link an Existing Account** if you have an appropriate account in your account list.
 - b. If you do not yet have an account, click **Create a new account** and enter a name for the new account.
- 4) Click **Import**.
- 5) Click **OK** to confirm and finish.

Update Accounts

Accounts you set up using a Web Connect file will not update automatically. To update the data in those accounts, simply log into your online banking at www.firstcoloradobank.com, download a current Web Connect file, and import it using the process described above.

Quicken Connect

With Quicken Connect, you will authorize Quicken to automatically download transactions from your financial institution by providing Quicken with your online banking credentials. This is a one-way connection; data is imported but Quicken cannot affect your transactions or balances.

Set up Quicken Connect

- 1) Choose **Add Account** on the sidebar.
- 2) Select the type of account you want to set up.
- 3) On the financial institution selection screen, type First Colorado National Bank to filter the list.
- 4) Select **First Colorado National Bank** from the list of available banks and click **Continue**.
- 5) Quicken will display a login screen. Type the credentials you use to log into your First Colorado National Bank online banking and follow the prompts to add your account to Quicken.

This may require multi-factor authentication, such as a security question, one-time passcode, etc.

Updating Accounts using One Step Update

After an account has been set up, you can update your accounts using One Step Update.

Click **Update Accounts** in the Quicken sidebar.

The screenshot shows the Quicken for Mac interface. On the left is a sidebar with account categories: All Accounts (\$50,000.00), Cash & Credit (\$50,000.00), Cash (\$50,000.00), Checking (\$0.00), Test Checking (\$50,000.00), Credit Card (\$0.00), CC 123 (\$0.00), Investments (\$0.00), Assets & Loans (\$0.00), Overview, Reports, Bill Reminders, and Budget. The main window displays the 'Test Checking' account with a balance of \$50,000.00. Below the account name are tabs for Transactions, Spending, and Income. A search bar and filter options are visible. A table shows one transaction: 10/23/14, Deposit, Opening Balance, 50,000.00, 50,000.00. At the bottom of the sidebar, the 'Update Accounts' button is highlighted with a dashed arrow and the text: 'Click the **Update Accounts** button to update accounts'.