GETTING STARTED WITH QUICKEN FOR WINDOWS

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

With Web Connect, you will download a file from the bank's website and upload that file into Quicken. This process does not require your online banking credentials to be provided to Quicken since the download occurs in First Colorado National Bank's online banking environment.

Download Transactions

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.

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** > **Web Connect File**. 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.

Express Web Connect

With Express Web 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 Express Web Connect

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

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 **Next**.

www.firstcoloradobank.com

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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.

<u>Updating Accounts using One Step Update</u>

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

1)   Choose **Tools** > **One Step Update**

2)   Enter the necessary information for the listed accounts (such as user ID and password) and click **Update Now**.

3)   Follow the instructions to update your accounts.

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