Mountain West Bank
Division of Glacier Bank
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Quicken Conversion

Instructions

WELCOME TO MOUNTAIN WEST BANK!

Your Quicken settings will need to be modified to ensure that your data connectivity transfers smoothly to the upgraded online banking system. This document contains instructions for both Windows and Mac, and all three connectivity types (Direct Connect, Express Web Connect or Web Connect).

The instructions inside refer to a 1st Action Date and 2nd Action Date. You select your own Action Dates anytime May 21st or later. Simply complete the conversion when it's convenient for you; start on one day and finish the next day.

Questions? Contact us.
1-800-641-5401 or email service@mountainwestbank.com.

mountainwestbank.com

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Quicken Conversion Instructions

Your Quicken settings will need to be modified to ensure that your data connectivity transfers smoothly to the upgraded online banking system. You can make these modifications when it's convenient for you **anytime May 21, 2024 or later**.

This document contains instructions for both Windows and Mac, and all three connectivity types (Direct Connect, Express Web Connect or Web Connect).

To navigate this document, just click the link or links below that match your product and connectivity.

Direct Connect: no changes necessary

Instructions for Downloading a Web Connect file from your Online Banking Site

Quicken Windows Web Connect

Back Up

1. Backup Quicken Windows Data File and Update.
    a. Choose **File > Backup and Restore > Backup Quicken File**.
    b. Download the latest Quicken Update. Choose **Help > Check for Updates**.
2. Complete a final transaction download.
    a. Complete last transaction update before the change to get all of your transaction history up to date.
    b. Repeat this step for each account you need to update.
    c. Accept all new transactions into the appropriate registers.

Modify Connection

1. Deactivate online banking connection for accounts connected to financial institution that is requesting this change.
    a. Choose **Tools > Account List**.
    b. Click **Edit** on the account to deactivate.
    c. In Account Details, click **Online Services**.
    d. Click **Deactivate**. Follow prompts to confirm deactivation.
    e. Click the **General** tab.
    f. Delete Financial Institution and Account Number information.
    g. Click **OK** to close window.
    h. Repeat steps for any additional accounts.
2. Reconnect online banking connection for accounts that apply.
    a. Download a Quicken Web Connect file from your financial institution's online banking site.
    b. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
    c. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
    d. Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
    e. Repeat this step for each account you have connected to this institution.
3. Follow your regular process for importing new transactions.

Quicken Mac Web Connect

Back Up

1. Backup your Quicken Mac data file and update the application.
    a. Choose **File > Save a Backup**.
    b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
    a. Complete last transaction update before the change to get all of your transaction history up to date.
    b. Repeat this step for each account you need to update.
    c. Accept all new transactions into the appropriate registers.

Modify Connection

Activate online banking connection for accounts connected to financial institution that is requesting this change.

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter your financial institution name in the search field, select the correct option and click **Continue**.
5. Log into your financial institutions online banking site and download your transactions to your computer.

    Important: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.
6. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web Connect**
for the "Connection Type" if prompted
7. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, click **Link** to pick your existing account.

    Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.
8. Click **Finish**.
9. Follow your regular process for importing new transactions.