

# Quicken for Windows

## Conversion Instructions—Direct Connect

Northwest offers Direct Connect for Quicken, which gives you the ability to seamlessly integrate your account information, pay bills, and quickly and easily download transactions. As MutualBank completes its conversion to Northwest, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task, as this information is time sensitive. To complete these instructions, you will need your Northwest User ID and Password.

It's important you perform the following instructions exactly as described and in the order presented. **If you do not, your service may stop functioning properly.** This conversion should take 15–30 minutes.

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### Task 1: Conversion Preparation.

1. Backup your data file by choosing the **Help** menu > Search. Search for **Backing Up Your Data** and follow the instructions.
2. Download the latest Quicken update. To download an update, choose the **Help** menu > **Search**. Search for **Update Software** and follow the instructions.

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### Task 2: Optional Task- Complete a final download before **Close of Business on April 24, 2020**

1. Download your Quicken Web Connect file from <https://www.bankwithmutual.com>
2. Click **File > File Import > Web Connect File**. Locate and select the Web Connect file to import.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.
4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

**NOTE: If you need assistance matching transactions, choose Help menu > Quicken Help. Search for Matching Transactions and follow the instructions.**

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## Conversion Instructions—cont

### Task 3: Deactivate Accounts in Quicken on or after **April 24, 2020**

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate**. Follow the prompts to confirm deactivation.
5. Click the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. **Repeat steps 2-6 for each MutualBank account.**

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### Task 4: Reactivate your accounts at Northwest on or after **April 27, 2020**.

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to activate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter **Northwest** and click **Next**.
7. On the **Select Connection Method** screen, select **Direct Connect**.
8. Type your **User ID** and **Password** and click **Connect**.
9. Ensure you associate the account to the appropriate account already listed in Quicken. You'll want to select **Link** to an Existing Account and select the matching accounts in the dropdown menu.

**IMPORTANT: Do NOT select Add to Quicken. If you're presented with accounts you don't want to track in this data file, select Ignore—Don't Download into Quicken.**

10. After all accounts have been matched, click **Next**. You'll receive confirmation that your account(s) have been added.
11. Click **Done** or **Finish**.

**IMPORTANT:** You don't need to download a transaction file from Online Banking using Direct Connect. Thank you for making these important changes!