

# Quicken for Windows

## Conversion Instructions—Web Connect

As MutualBank completes its conversion to Northwest, you'll 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'll 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, then > **Search** . Search *Backing Up Your Data* and follow the instructions.
2. Download the latest Quicken update. To download an update, choose the **Help** menu, then **Search** and type in *Update Software*.

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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: Re-activate your Account(s) at Northwest on or after **April 27, 2020**

1. Log in to your Online Banking at **Northwest.com**
2. From Account Details, filter your transactions by selecting **Show Filters**. Change the **Time Period** to **Custom Date** and enter a start date and end date, select **Apply Filters**.

**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.**

3. Export the following Web Connect File
  - a. .qfx (Quicken)
4. Click **File > File Import > Web Connect File**
5. **If prompted for connectivity type, select Web Connect**
6. 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 account in the dropdown menu.

**IMPORTANT: Do NOT select Create a New Account. If you're presented with accounts you don't want to track in this data file, select Ignore. Don't download into Quicken or click the Cancel button.**

7. Repeat steps 2-6 for all of your accounts.

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**Thank you for making these important changes!**