



Quicken Conversion Instructions

As **Great Western Bank** completes its system conversion to **First Interstate Bank**, you will need to modify your Quicken settings to ensure that your data connectivity transfers smoothly to the new system. This document contains instructions for both Windows and Mac, and connectivity types Express Web Connect or Web Connect.

These instructions refer to two “Action Dates.” The 1st Action Date and 2nd Action Date in the instructions are provided to you in this document.

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Quicken Windows Express Web Connect

On the 1st Action Date: **Friday, May 20, 2022, at 5 p.m. MT/6 p.m. CT**

1. Back up your Quicken Windows Data File. Go to **File > Backup and Restore > Backup Quicken File**.
2. Download the latest Quicken Update. Go to **Help > Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

On the 2nd Action Date: **Tuesday, May 24, 2022**

1. Deactivate online banking connection for accounts connected to Great Western Bank.
 - 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 Great Western Bank and Account Number information. Click **OK** to close window.
 - g. Repeat steps for any additional accounts that apply.
2. Reconnect the online banking connection for your accounts.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account you want to activate.
 - c. In Account Details, click **Online Services** and then choose **Set up Now**.
 - d. Type **First Interstate Bank** name in the search field and click **Next**.
 - e. Enter your First Interstate Bank credentials.
 - Express Web Connect uses the same credentials you use for First Interstate Bank's online banking login.
 - Important: If your credentials do not work, contact First Interstate Bank.**
 - f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu.

Important: Do NOT choose "Create a new account" unless you intend to add a new account to Quicken. If you are presented with accounts, you do not want to track in this data file, choose Ignore - Don't Download into Quicken or click Cancel.
 - g. After all accounts have been matched, click **Next** and then **Done**.

Quicken Mac Connect

On the 1st Action Date: **Friday, May 20, 2022, at 5 p.m. MT/6 p.m. CT**

1. Backup 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. Accept all new transactions into the appropriate registers.

On the 2nd Action Date: **Tuesday, May 24, 2022**

Activate the online banking connection for accounts connected **First Interstate Bank**.

1. Click your account in the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter First Interstate Bank in the search field, select the correct option and click **Continue**.
5. Enter your First Interstate Bank credentials.
 - Express Web Connect uses the same credentials you use for your institution's online banking login.

Important: If your credentials do not work, contact First Interstate Bank.

6. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under **Action**, choose **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.

7. Click **Finish**.

Quicken Windows Web Connect

On the 1st Action Date: **Friday, May 20, 2022, at 5 p.m. MT/6 p.m. CT**

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.

On the 2nd Action Date: **Tuesday, May 24, 2022**

1. Deactivate online banking connection for accounts connected to Great Western Bank.
 - 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 Great Western Bank 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 First Interstate Bank'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.

Quicken Mac Web Connect

On the 1st Action Date: **Friday, May 20, 2022, at 5 p.m. MT/6 p.m. CT**

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.

On the 2nd Action Date: **Tuesday, May 24, 2022**

Activate online banking connection for accounts connected to First Interstate Bank.

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter First Interstate Bank in the search field, select the correct option and click **Continue**.
5. Log into your First Interstate Bank 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**.