Quicken® Conversion Instructions

Your Quicken settings will need to be modified to ensure that your data connectivity transfers smoothly to the new Online and Mobile Banking system.

When you are asked to select a bank, choose **Guaranty Bank & Trust-TX**. Do NOT select Guaranty Bank & Trust (Now Glacier Bank).

CORRECT:

INCORRECT:

This document contains instructions for both Windows and Mac. Click the link or links below that match your product and connectivity.

NOTE: This document provides general guidance and may not include the latest updates. For the most up-to-date Quicken® instructions, please refer https://www.quicken.com/support/.

Quicken® Windows Web Connect

1. Deactivate online banking connection for accounts connected to the prior system.
    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 the new 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 steps for any additional accounts.

3. Follow your regular process for importing new transactions.

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Quicken® Mac Web Connect

Activate online banking connection for accounts connected to the prior system.

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