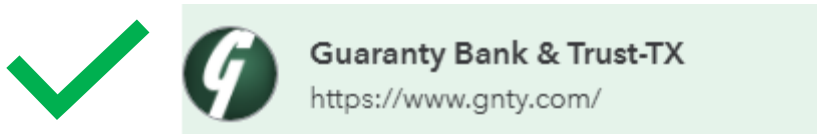


Quicken® Conversion Instructions

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, and all three connectivity types (Direct Connect, Express Web Connect or Web Connect). Click the link or links below that match your product and connectivity.

Instructions for One-Step Update initiated from within Quicken

[Quicken® Windows Direct Connect and Express Web Connect](#) - Page 2

[Quicken® Mac Direct Connect and Quicken Connect](#) - Page 3

Instructions for Downloading a Web Connect file from Online Banking

[Quicken® Windows Web Connect](#) - Page 4

[Quicken® Mac Web Connect](#) - Page 4

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 Direct Connect and Express Web Connect

In Quicken®

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. 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 bank name in the search field and click Next.
 - e. Enter your credentials:
 - Express Web Connect uses the same credentials you use for your Online Banking login.
 - Direct Connect might require credentials that do not match your Online Banking credentials.
 - If you receive an error, please follow the next steps within Online Banking.

In Online Banking

3. Log in to Online Banking.
4. Select your profile button on the bottom left of the screen and click Settings.
5. Under the General section, click **Security**.
6. Click **Manage** next to Direct Connect.
7. Allow the QuickBooks/Quicken connection within this page.
8. Navigate back to Quicken.

In Quicken®

9. Repeat step '2.e' above. You should not receive an error again.
10. 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**.

11. After all accounts have been matched, click **Next** and then **Done**.
12. Follow your regular process for importing new transactions.

Quicken® Mac Direct Connect and Quicken Connect

In Quicken®

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

1. Click your account in 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 correct option and click **Continue**.
5. Enter your credentials:
 - Express Web Connect uses the same credentials you use for your Online Banking login.
 - Direct Connect might require credentials that do not match your Online Banking credentials.
 - If you receive an error, please follow the next steps within Online Banking.

In Online Banking

6. Log in to Online Banking.
7. Select your profile button on the bottom left of the screen and click Settings.
8. Under the General section, click **Security**.
9. Click **Manage** next to Direct Connect.
10. Allow the QuickBooks/Quicken connection within this page.
11. Navigate back to Quicken.

In Quicken®

12. Repeat step '5' above. You should not receive this error again.
13. 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.

14. Click **Finish**.
15. Follow your regular process for importing new transactions.

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 your 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 any additional accounts.
3. Follow your regular process for importing new transactions.

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 correct option and click **Continue**.
5. Log in to Online Banking 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.