

Quicken for Mac

Conversion Instructions—Direct 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.

Task 1: Conversion Preparation.

1. Backup your data file by choosing the **Help** menu, then **Search** and typing in *Backing Up Your Data*.
2. Download the latest Quicken update. To download an update, choose the **Help** menu, then **Search** and type in *Check for Updates*.

Task 2: Connect Account(s) at Northwest on or after April 27, 2020.

1. Select your account under the **Accounts** list on the left side of the page.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download**.
4. Enter *Northwest* in the **Search** field and click **Continue**.
5. Type in your **User ID** and **Password** and click **Continue**.

NOTE: Select **Direct Connect** for the **Connection Type** if prompted.

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6. In the **Accounts Found** screen, ensure you associate each new account with the appropriate account already listed in Quicken. Under the **Action** column, select **Link** to pick your existing account.

IMPORTANT: Do NOT select Add under the action column unless you intend to add a new account to Quicken.

7. Click **Finish**.

IMPORTANT: You don't need to download a transaction file from Online Banking using Direct Connect.

Thank you for making these important changes!