



Quicken® Upgrade Instructions

Opportunity Bank of Montana is updating our digital banking platform. To help make this transition as smooth as possible, there are a few simple steps you'll need to take on two specific dates:

- First action date: *prior to upgrade* - **before Thursday, August 21, 2025**
- Second action date: *post-upgrade* - **on or after Wednesday, September 3, 2025**

This guide includes:

- Instructions for both Windows and Mac users
- Steps for both Direct Connect and Web Connect connection methods

Quicken® for **Windows Direct Connect and Express Web Connect** – p2

Quicken® for **Mac Direct Connect and Quicken® Connect** – p3

Quicken® for **Windows Web Connect** – p4

Quicken® for **Mac Web Connect** – p6

Please review the section that applies to you and note the action dates provided.

Quicken® **Windows Direct Connect and Express Web Connect**

Prior to Thursday, August 21, 2025

1. **Backup** Quicken Windows data file.
 - a. Choose **File > Backup and Restore > Backup Quicken® File**.
 - b. Download the latest Quicken® Update. Go to **Help > Check for Updates**.
2. **Complete a final transaction download** and match downloaded transactions.
 - a. Complete a final transaction update before the upgrade for complete, up-to-date transaction history.
 - b. Accept all new transactions into the appropriate registers (required).

On or after Wednesday, September 3, 2025

1. **Deactivate** your online banking connection for your Opportunity Bank of Montana accounts.
 - 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 Opportunity Bank of Montana and your Account Number information. Click **OK** to close window.
 - g. Repeat steps for any additional accounts that apply.
2. **Reconnect** your online banking connection for your Opportunity Bank of Montana 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. Enter **Opportunity Bank of Montana** in the search and select **Next**.
 - e. Enter your login credentials for Opportunity Bank of Montana online banking.
 - Express Web Connect uses the same credentials you use for Opportunity Bank of Montana's online banking login.
 - Direct Connect might require credentials that do not match your online banking credentials.
 - **Important: If your credentials do not work, contact your local Opportunity Bank of Montana branch.**
 - f. Ensure you associate the accounts with 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 Direct Connect and Quicken Connect**

Prior to Thursday, August 21, 2025

1. **Backup** Quicken Mac data file & update.
 - 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 a final transaction update before the upgrade for complete, up-to-date transaction history.
 - b. Accept all new transactions into the appropriate registers (required).

On or after Wednesday, September 3, 2025

1. **Activate** the online banking connection for accounts connected to Opportunity Bank of Montana.
 - a. Click your account in the Accounts list on the left side.
 - b. Choose **Accounts > Settings**.
 - c. Select **Set up transaction download**.
 - d. Enter **Opportunity Bank of Montana** in the search field, select the correct option and click **Continue**.
 - e. Enter your login credentials for Opportunity Bank of Montana online banking.
 - f. Express Web Connect uses the same credentials you use for Opportunity Bank of Montana online banking login.
 - g. Direct Connect might require credentials that do not match your Opportunity Bank of Montana online banking credentials.

Important: If your credentials do not work, contact your local Opportunity Bank of Montana branch.
 - h. 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®.
 - i. Click **Finish**.

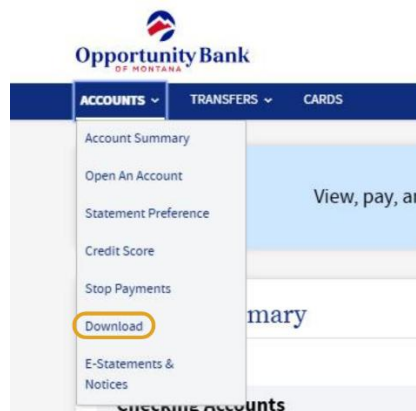
Quicken® **Windows Web Connect**

Prior to Thursday, August 21, 2025

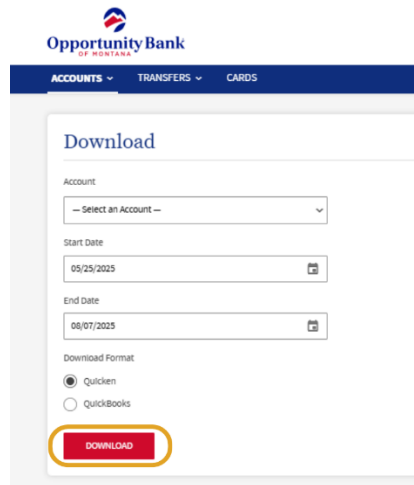
1. **Backup** Quicken Windows data file & update.
 - c. Choose **File > Backup and Restore > Backup Quicken File**.
 - d. Download the latest Quicken update. Go to **Help > Check for Updates**.
2. **Complete a final transaction download** and match downloaded transactions.
 - c. Complete a final transaction update before the upgrade for complete, up-to-date transaction history.
 - o Repeat this step for each account you need to update.
 - d. Accept all new transactions into the appropriate registers (required).

On or after Wednesday, September 3, 2025

1. **Deactivate** your online banking connection for your Opportunity Bank of Montana accounts.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click the **General** tab.
 - e. Delete Opportunity Bank of Montana and your account number information.
 - f. Click **OK** to close window.
 - g. Repeat steps for any additional accounts that apply.
2. **Reconnect** your online banking connection for your Opportunity Bank of Montana accounts.
 - a. Download a Quicken Web Connect file from your Opportunity Bank of Montana online banking account.
 - o Login to Opportunity Bank of Montana online banking.
 - o On the landing page, select **Accounts**.
 - o From the drop-down menu, click on **Downloads**.



- On the Download landing page, select the account, start date, end date, and Quicken.



- Click **Download** and save the file to your computer.
- 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 with the correct account listed in Quicken.
- e. Repeat this step for each account you have connected to Opportunity Bank of Montana.

Quicken® **Mac Web Connect**

Prior to Thursday, August 21, 2025

1. **Backup** QuickBooks Mac data file & update.
 - a. Choose **File > Save Back Up**.
 - b. Download the latest Quicken update. Choose **Quicken > Check for Updates**.
2. Complete a **final transaction download**.
 - a. Complete a final transaction update before the upgrade for complete, up-to-date transaction history.
 - Repeat this step for each account you need to update.
 - b. Accept all new transactions into the appropriate registers (required).

On or after Wednesday, September 3, 2025

1. **Activate** your online banking connection for your Opportunity Bank of Montana accounts
 - a. Select your account under the Accounts list on the left side.
 - b. Choose **Accounts > Settings**.
 - c. Enter *Opportunity Bank of Montana* in the search field, select the correct option and click **Continue**.
 - d. Log into your Opportunity Bank of Montana digital banking profile 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.
 - e. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web Connect** for the “Connection Type” if prompted.
 - f. 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.
 - g. Click **Finish**.