

Quicken for Mac 2005 - 2007 Conversion Instructions

[Web Connect]



As **American Bank of Oklahoma** completes its system upgrade, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your customer ID and Password for the **American Bank of Oklahoma** website.

It is important that 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.



This update is time sensitive and can be completed on or after **September 24, 2012**.

Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu → **Search**. Search for and select “Backing Up Your Data” and follow the instructions.
2. Download the latest Quicken update. For instructions to download an update, choose **Help** menu → **Search**. Search for and select “Checking for updates to Quicken” and follow the instructions.

Connect to **American Bank of Oklahoma**

1. Choose **Online** menu → **Download Transactions...**
2. Select your account from the drop-down list.
3. Click **Download** to access **American Bank of Oklahoma** website at www.americanbankok.com.
4. Enter your customer ID and Password to login to the **American Bank of Oklahoma** web site. Download your transactions through **September 24, 2012** into Quicken.

5. Repeat the download process for each account you have at **American Bank of Oklahoma** (such as checking, savings).
6. Once all accounts have been downloaded, accept all transactions into your Quicken account registers.

Deactivate Your Account(s)

1. Choose **Lists** menu → **Accounts**.
2. Select the account that you want to disable and click **Edit**.
3. In the Download Transactions drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
4. Delete the information within the Account Number and Routing Number fields.
5. Click **OK** to save your edits.
6. Repeat steps 2 – 6 for each account at **American Bank of Oklahoma**.
7. Verify that your account list does not display a blue online circle icon for any accounts at **American Bank of Oklahoma**.

Re-Activate Your Account(s) at **American Bank of Oklahoma**

1. Log into the **American Bank of Oklahoma** website at www.americanbankok.com.
2. Download your transactions to Quicken.
3. Click the **Use an existing account** radio button.
4. Select the corresponding existing Quicken account in the drop-down list and click **OK**.
5. Repeat steps 2 – 4 for all accounts at American Bank of Oklahoma.
6. Choose **Lists** menu → **Accounts**. Verify that each account at American Bank of Oklahoma has a blue online circle indicating that it has been reactivated for online services.

Thank you for making these important changes!