

Quicken for Windows 2010 - 2012 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. Log in to **American Bank of Oklahoma** web site at www.americanbankok.com. Download your transactions into Quicken.
2. Once the transactions are downloaded, accept all transactions into your Quicken account register.
3. Repeat this step for each account (such as checking, savings) that you use for online banking or investing.

Deactivate Your Account(s) At **American Bank of Oklahoma**

1. Choose **Tools** menu → **Account List**.
2. Click the **Edit** or **Edit Details** button of the account you want to deactivate.
3. In the Account Details dialog, click on the **Online Services** tab.
4. Click **Deactivate** or **Remove from One Step Update**. Follow the prompts to confirm the deactivation.



Note: The name of the buttons referenced above may vary depending on the services you currently use and version of Quicken.

5. Click on the **General** or **General Information** tab. Delete the Account Number.
6. Delete the name of the Financial Institution. Click **OK** to close the window.
7. Repeat steps 2 – 7 for each account at **American Bank of Oklahoma**.

Re-activate Your Account(s) At **American Bank of Oklahoma**

1. Log in to **American Bank of Oklahoma** web site at www.americanbankok.com.
2. Download your transactions to Quicken.
3. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** or **Use an existing Quicken account** and select the matching account in the drop-down menu.



DO NOT select **Create a new account** or **Create a new Quicken account**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.

4. Repeat steps 2 – 3 for all of your accounts.

Thank you for making these important changes!