

Quicken Essentials for Mac Conversion Instructions

[Express 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 “Backing Up” and select “Backing up data files” and follow the instructions.
2. Download the latest Quicken update. For instructions to download an update, choose **Help** menu → **Search**. Search for “Updates” and select “Check for Updates...” and follow the instructions.

Connect to **American Bank of Oklahoma**

1. Select your account under the “**Accounts**” list on the left side.
2. Choose **Accounts** menu → Select “**Update Selected Online Account**”.
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. Select your account under the “**Accounts**” list on the left side.
2. Choose **Accounts** menu → **Settings**.
3. Remove the checkmark from “I want to download transactions”.
4. Click **Save**.
5. Click **Continue** when asked to confirm this deactivation.

Note: Repeat steps 2 –5 for each account at **American Bank of Oklahoma**.

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

1. Select your account under the “**Accounts**” list on the left side.
2. Choose **Accounts** menu → Select “**Update Selected Online Account**”.
3. Click “**List**” → Select **American Bank of Oklahoma**
4. Click “**Continue**”.



Select “**Quicken Connect**” for the “**Connection Type**” if prompted.

5. Click “**Save**”.
6. Enter your “Login Credentials” for **American Bank of Oklahoma**.
7. Click “**Continue**”.
8. In the “Choose your Accounts” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, you will want to select your existing account.



DO NOT select “**ADD**” under the action column.

9. Repeat step 8 for each additional account you wish to download into Quicken
10. Click “**Continue**”.

Thank you for making these important changes!