

Quicken Essentials for Mac Conversion Instructions

Quicken Essentials for Mac 2010

Web Connect

Table of Contents

- TABLE OF CONTENTS 2**
- INTRODUCTION..... 3**
- DOCUMENTATION AND PROCEDURES 3**
 - Task 1: Conversion Preparation.....3
 - Task 2: Deactivate Your Account(s) At First Bank of Owasso.....3
 - Task 3: Re-activate Your Account(s) at First Bank of Owasso3



Introduction

As **First Bank of Owasso** completes its system conversion to Intuit Financial Services, you will need to modify your Quicken settings to ensure the smooth transition of your data.

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.

NOTE: This update is time sensitive, and cannot be initiated until after you have completed your initial login to the new online banking system from Intuit Financial Services. You will need your permanent **Access ID (Client ID) and Password** for the new online banking system to complete the following conversion steps. The new online banking system will be available for your initial login at 9:00am (central time) on December 12.

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up**, 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**, select "Check for Updates," and follow the instructions.

Task 2: Deactivate Your Account(s) At First Bank of Owasso

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.
6. Repeat steps 2 – 5 for each account at **First Bank of Owasso**.

Task 3: Re-activate Your Account(s) at First Bank of Owasso

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Click **List** menu > Select **First Bank of Owasso DC & WC QFX**.
4. Click **Continue**.

NOTE: Select "Quicken Connect" for the "Connection Type" if prompted.

5. Enter your Login Credentials for **First Bank of Owasso**.
6. Click **Continue**.
7. In the "Choose your Accounts" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select your existing account, and each additional account you wish to download into Quicken Essentials.

IMPORTANT: Do **NOT** select "**ADD**" under the action column.

8. Click **Continue**.

Thank you for making these important changes!