

# Quicken for Mac Conversion Instructions

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*Quicken for Mac 2005-2007*

*Web Connect to Direct Connect*

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## 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

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### Task 1: Conversion Preparation

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

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

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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. Remove the information within the **Account Number** and **Routing Number** fields.
5. Click **OK** to save your edits.
6. Repeat steps 2 – 5 for each account at **First Bank of Owasso**.
7. Verify that your account list does not display a blue online circle icon for any accounts at **First Bank of Owasso**.

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

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1. Select your account under the **Accounts** list on the left side.
2. Choose **Lists** menu > **Accounts**.
3. Select your first disabled account and click **Edit**.
4. Click the **Financial Institution** drop-down list and select **Change Financial Institution**.
5. Click **Update List**.
6. In the **Financial Institutions** dialog, select *First Bank of Owasso* from the list and click Use.
7. Enter the **Customer ID** and **PIN**. Click **OK**.
8. In the **Add Online Services** dialog, match your first account to the appropriate account number. Click **OK**.

**NOTE:** Each account will be displayed below "Use an existing account."

9. Click **OK**.
10. Click **OK** to close the **Edit Register** page.
11. Choose **Lists** menu > **Accounts**. Verify that each account at *First Bank of Owasso* has a blue online circle indicating that it has been reactivated for online services.

***Thank you for making these important changes!***