

Quicken for Windows Conversion Instructions

Quicken for Windows 2010–2013

Web 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

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 Your Data* and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for *Checking for Updates to Quicken* and follow the instructions.

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

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 can vary depending on the services and the version of Quicken you are using.

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

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

1. Log in to *First Bank of Owasso* web site at <http://www.firstbank.net>.
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.

IMPORTANT: 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!