

Quicken Essentials for Mac Conversion Instructions

Quicken Essentials and Quicken Mac 2016-2018

Web Connect

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Introduction

As **American Enterprise Bank** completes its system conversion to **Schaumburg Bank & Trust, N.A.**™, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your login credentials for the **American Enterprise Bank** and **Schaumburg Bank & Trust, N.A.** websites.

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. Tasks 1-3 must be completed on or before Friday, December 7th. Task 4 can be completed on or after Monday, December 10th.

Documentation and Procedures

Task 1: Conversion Preparation on or before Friday, December 7th.

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: Connect to American Enterprise Bank on or before Friday, December 7th.

1. In Quicken, select your account under the "**Accounts**" list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Deactivate Your Account(s) At American Enterprise Bank

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 **American Enterprise Bank**.

Task 4: Re-activate Your Account(s) at Schaumburg Bank & Trust, N.A. on Monday, December 10th.

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Enter **Schaumburg Bank & Trust, N.A.** in the Search field and click **Continue**.
4. Log in to **Schaumburg Bank & Trust, N.A.** at www.bankschaumburg.com
5. **Download** a file of your transactions to your computer

IMPORTANT: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

6. Drag and drop the downloaded file into the box **Drop download file**.

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

7. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select "**Link**" to pick your existing account.

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

8. Click **Continue**.

Thank you for making these important changes!