Quicken Essentials for Mac Conversion Instructions

Quicken Essentials and Quicken Mac 2016-2017

Express Web Connect

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Introduction

As ***American Enterprise Bank*** completes its system conversion to ***Northbrook Bank & Trust Company®,*** you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your customer ID and PIN for the ***American Enterprise Bank*** and ***Northbrook Bank & Trust Company*** 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

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

1. 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 Northbrook Bank & Trust Company

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Check the box I want to download transactions and click Assist me.
4. Enter ***Northbrook Bank & Trust Company*** in the Search field and click **Continue**.
5. Enter your Login Credentials for ***Northbrook Bank & Trust Company*** and click **Continue**.
6. If the bank requires extra information, enter it to **Continue**.

NOTE:	Select "Express Web Connect" or "Quicken 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, 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!