Quicken for Mac 2007 Conversion Instructions

Web Connect to Direct Connect

Introduction

As ***AmFirst Bank*** completes its system conversion to ***Pinnacle Bank Nebraska,*** you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

NOTE:	**Web Connect** uses the same User ID and Password as the ***AmFirst Bank*** website. **Direct Connect** may require registration. Please contact ***Pinnacle Bank*** to verify your Direct Connect login information.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

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 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.

Task 2: Connect to ***AmFirst Bank*** for a final download before 5pm CST/4pm MST on ***September 16, 2017***

1. Choose **Online** menu > **Download Transactions.**

2. Select your account from the drop-down list.

3. Click **Download** to access http://www.amfirstbank.com/2744/mirror/ne_index.htm.

4. Enter your **User ID** and **Password** to login to the website. Download your transactions through ***September 15, 2017*** into Quicken.

5. Repeat the download process for each account you have (such as checking, savings, credit cards and brokerage).

6. Once all accounts have been downloaded, accept all transactions into your Quicken account registers.

Task 3: Disconnect Accounts At ***AmFirst Bank*** on or after ***September 18, 2017***

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1. Choose **Lists** menu > **Accounts**.

2. Select the account to deactivate 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 for each account to be disconnected.

7. Verify your account list does not display a blue online circle icon for the accounts you are disconnecting.

Task 4: Reconnect Accounts to ***Pinnacle Bank*** on or after ***September 18, 2017***

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1. Choose **Lists** menu > **Accounts**.

2. Select your first disabled account and click **Edit**.

3. Click the **Financial Institution** drop-down list and select **Change Financial Institution**.

4. Click on **Update List**.

5. In the **Financial Institutions** dialog, enter, then select ***Pinnacle Bank Nebraska (for retail users) or Pinnacle Bank Nebraska - Business (for business users)*** from the list and click **Use**.

6. Enter your Direct Connect **User ID** and **Password**. Click **OK**.

7. 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**."

8. Click **OK**.

9. Click OK to close the **Edit Register** page.

10. Choose **Lists** menu > **Accounts**. Verify that each account you are reconnecting has a blue online circle for online services.