



# Amboy Bank Guide

## Linking Quicken®

March 2022

Here is a step-by-step guide to quickly and easily link your Amboy Bank accounts to your Quicken® software.

First, Login to your Quicken® software <https://app.quicken.com>. Your home screen may look similar to this:

The screenshot displays the Quicken web application interface. A red callout bubble points to the URL <https://app.quicken.com> in the browser address bar. The interface includes a sidebar with account categories and a main dashboard with several widgets.

**ACCOUNTS**

Category	Balance
TOTAL	\$3,177.73
BANKING	\$3,177.73
Cash & Checking	\$1,612.01
Free Personal Checking	\$1,612.01
Credit	\$505.00
Debit Card	\$505.00
Savings	\$1,060.72
Statement Savings	\$1,060.72

**SET UP YOUR QUICKEN**

- ✓ Add Accounts
- ✓ Connect Your Bills
- ✓ Create a Budget

**RECENT TRANSACTIONS**

Bank	Date	Category	Amount
Veritybank	01/10/2022	Personal Income	\$0.17
Veritybank	01/10/2022	Cash & ATM	\$0.20
Veritybank	01/10/2022	Personal Income	\$0.03
Deposit	01/06/2022	Personal Income	\$1,000.00
Interest	12/31/2021	Interest Earned	\$0.11

**TOP SPENDING CATEGORIES MONTH TO DATE**

No Spending

It looks like you haven't spent any money this month. [Click here to choose a different date range.](#)

**BUDGET**

It looks like you don't have a budget set up. To see your budget on the web, set up a budget on Quicken Mac or Quicken Windows, and perform a one step update.

**SPENDING OVER TIME**

Line chart showing spending from OCT to MAR. Values range from \$0 to \$2.0.

**INVESTMENT SUMMARY**

No Accounts

Use a Quicken desktop application to add an investment account, and then sync the account to Quicken web.

**NET INCOME OVER TIME**

Bar chart showing net income from OCT to MAR. Values range from \$0 to \$2,000.

**INVESTMENT TOP MOVERS**

No Accounts

Use a Quicken desktop application to add an investment account, and then sync the account to Quicken web.

**TOP PAYEES THIS MONTH**

No Spending

It looks like you haven't spent any money this month.

Next, click on the plus sign to add your Amboy accounts.

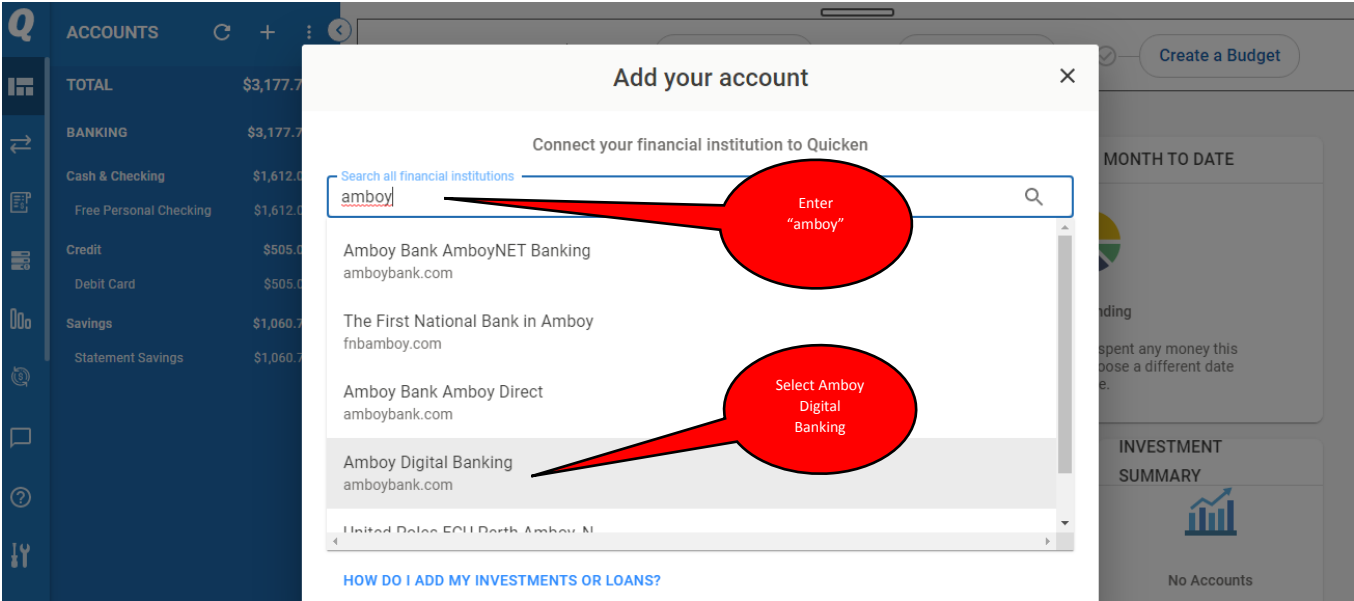
The screenshot shows the Quicken web interface. On the left is a blue sidebar with the 'ACCOUNTS' menu. A red callout bubble with the text 'Click here' points to a plus sign (+) in the top right of the 'ACCOUNTS' menu. The main content area is titled 'SET UP YOUR QUICKEN' and includes buttons for 'Add Accounts', 'Connect Your Bills', and 'Create a Budget'. Below this are several data panels: 'RECENT TRANSACTIONS' with a table of transactions; 'TOP SPENDING CATEGORIES MONTH TO DATE' with a pie chart and 'No Spending' message; 'BUDGET' with a message about not having a budget set up; 'SPENDING OVER TIME' with a line chart; 'INVESTMENT SUMMARY' with a message about no accounts; 'NET INCOME OVER TIME' with a bar chart showing income in January; 'INVESTMENT TOP MOVERS' with a message about no accounts; and 'TOP PAYEES THIS MONTH' with a message about no spending.

Account	Date	Category	Amount
Veritybank	01/10/2022	Personal Income	\$0.17
Veritybank	01/10/2022	Cash & ATM	\$0.20
Veritybank	01/10/2022	Personal Income	\$0.03
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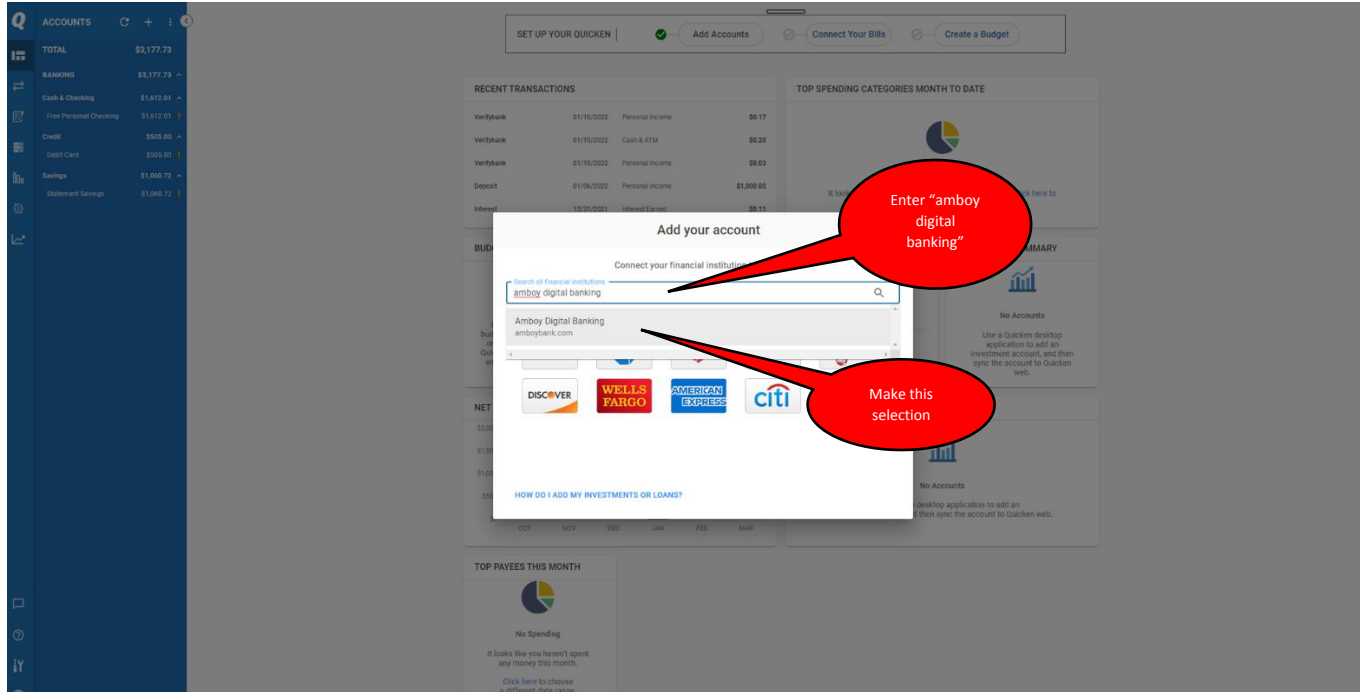
Month	Spending
OCT	\$0.0
NOV	\$0.0
DEC	\$0.0
JAN	\$0.0
FEB	\$0.0
MAR	\$0.0

Month	Net Income
OCT	\$0.0
NOV	\$0.0
DEC	\$0.0
JAN	\$1,000.00
FEB	\$0.0
MAR	\$0.0

The next screen to appear will walk you through the steps to access your Amboy Bank account so that you can link your account information. A pop-up window will appear where you can start your search. In this first example, if you simply type “amboy” in the search bar, you will need to select the option marked “Amboy Digital Banking” from the drop-down menu.



If you choose to type “amboy digital banking” in the search bar, you will get only one selection in the drop down menu. That is the correct choice.



You will now be able to enter your Amboy Bank login credentials and connect to your account information. Enter the information in the required fields (login ID and password), then select “Connect Bank.”

