Online Banking Web Connect Conversion
Quicken Windows 2009

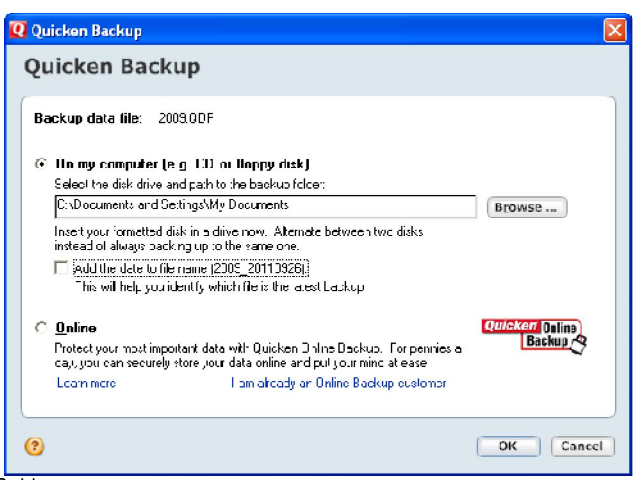
As The Bank of Carbondale completes its system conversion to eBanking, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your customer ID, PIN/Password and security questions.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online banking service may stop functioning properly. This conversion should take 15–20 minutes.

This update is time sensitive and can be completed on or after April 10, 2012.

Back Up Your Current Data

1. Choose File menu → Backup.
2. Specify which file to back up and where you want the backup saved in the Quicken Backup dialog, and then click OK.



Download the Latest Quicken Update

1. Click on the Online menu → select One Step Update (Click Cancel if presented with Password Vault dialog box).
2. Uncheck all boxes → click Update Now in the One Step Update Settings dialog box.
3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.
4. When the update is completed, close and reopen Quicken.

Get Your Latest Transactions

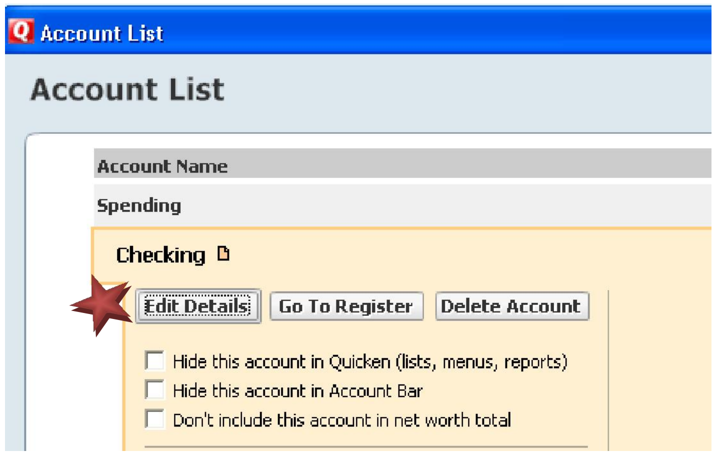
1. Log into your financial institution’s web site → Download your transactions into Quicken.
2. Once the transactions are downloaded, accept all the transactions into your Quicken account register.
3. Repeat steps 1 and 2 for each account that you use for online banking or investing.

Note: You may not be able to download these transactions after the conversion.

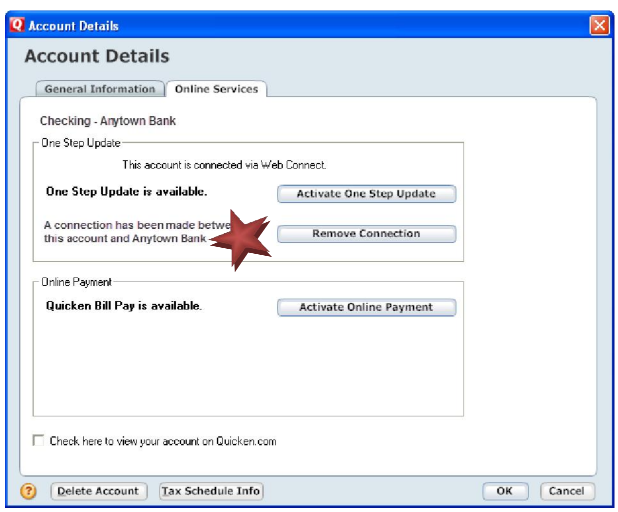
Important: You will not be able to proceed to the next section until you accept all transactions in the Downloaded Transactions tab.

Deactivate Web Connect

1. Click on the Tools menu → select Account List. Highlight the account you want to deactivate → click on the Edit Details button.

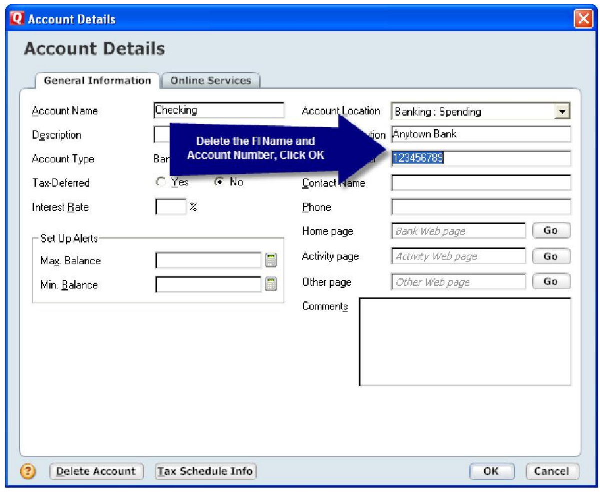


2. Click the Online Services tab → click the Remove Connection button.



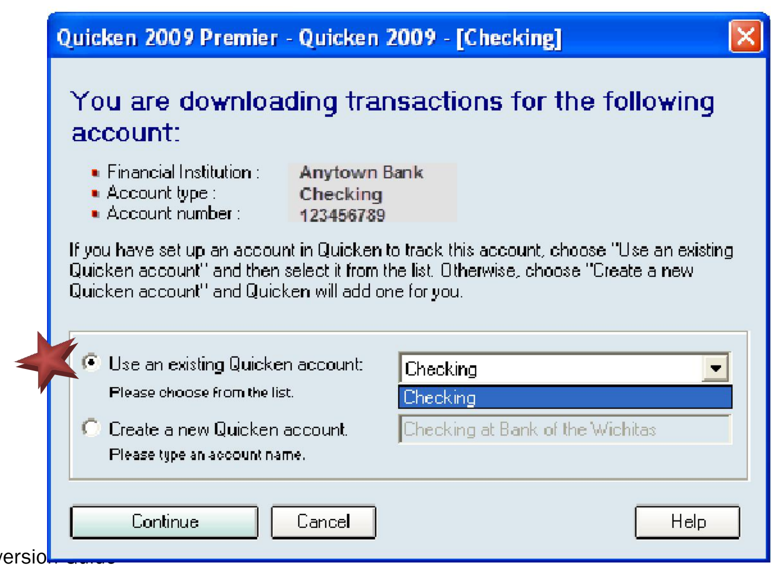
3. Quicken will prompt you to confirm deactivation → click Yes → click OK

4. Select the General Information tab and remove the Financial Institution Name and Account Number as shown below → click OK to save changes.

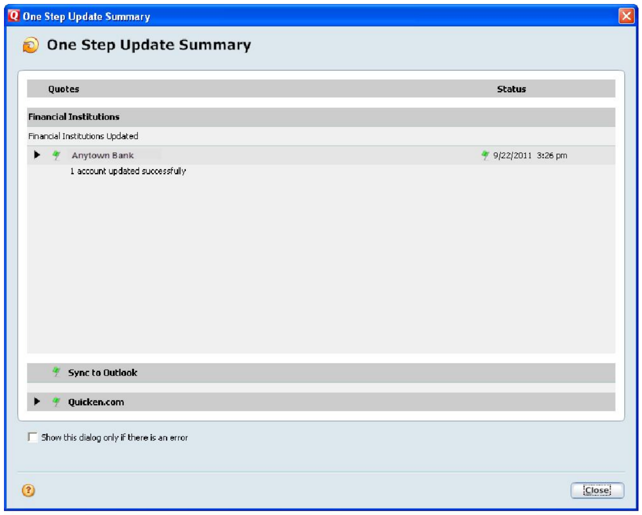


5. Repeat this ste … banking.

1. Log into eBank … nitiate a download of a Web Conn … the screen below, choose the "Us

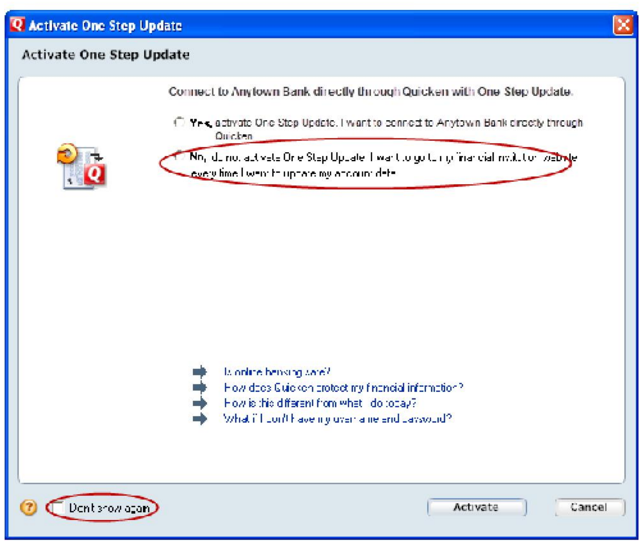


2. The One Step Update Summary screen will appear, confirming the account updated successfully.



3. Repeat steps 1 … banking or investing

NOTE: Now the a… …uicken may prompt to activate One St… …ownload. Please select No do not a… …d again.



Congratulations, you have completed the necessary changes!