

Quicken Essentials for Mac Conversion Instructions

Version 2010 - 2012 using Web Connect



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 and PIN for the Online Banking and eBanking 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.



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

Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu → **Search**. Search for “Backing Up” and 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” and select “Check for Updates...” and follow the instructions.

Deactivate Your Account(s) on Online Banking

3. Remove the checkmark from “I want to download transactions.”
4. Click **Save**.

Note: Repeat steps 2 – 4 for each account at The Bank of Carbondale.

Re-activate Your Account(s) on eBanking

1. Log in to eBanking web site at www.tboc.com
2. Download your transactions to Quicken.
3. Ensure you associate the account to the appropriate account already listed in Quicken. Under the **Action** column, you will want to select your existing account.



DO NOT select “**ADD**” under the action column.

4. Repeat steps 2-3 for each additional account.

Thank you for making these important changes!