

# Quicken for Mac Conversion Instructions

## Version 2005 - 2007 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 The Bank of Carbondale 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 and 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 and select “Checking for updates to Quicken” and follow the instructions.

### Deactivate Your Account(s)

1. Choose **Lists** menu → **Accounts**.
2. Select the account that you want to disable and click **Edit**.
3. In the Download Transactions drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
4. Delete the information within the Account Number and Routing Number fields.

5. Click **OK** to save your edits.
6. Repeat steps 2 – 6 for each account at The Bank of Carbondale.
7. Verify that your account list does not display a blue online circle icon for any accounts at The Bank of Carbondale.

## Re-Activate Your Account(s) on eBanking

1. Log into the eBanking website at [www.tboc.com](http://www.tboc.com)
2. Download your transactions to Quicken.
3. Click the **Use an existing account** radio button.
4. Select the corresponding existing Quicken account in the drop-down list and click **OK**.
5. Repeat steps 2 – 4 for all accounts at eBanking.
6. Choose **Lists** menu → **Accounts**. Verify that each account at eBanking has a blue online circle indicating that it has been reactivated for online services.

**Thank you for making these important changes!**