Quicken for Windows Conversion Instructions
Version 2010 – 2012 using Express 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. To complete these instructions, you will need your customer ID and PIN.

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 must 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 → **Quicken Help**. Search for "Backup Data File" and follow the instructions.
2. Download the latest Quicken update. For instructions to download to download an update, choose **Help** menu → **Quicken Help**. Search for "Update Software" and follow the instructions.

Deactivate Your Account(s)

1. Choose **Tools** menu → **Account List**.
2. Click the **Edit** or **Edit Details** button of the account you want to deactivate.
3. In the Account Details dialog, click on the **Online Services** tab.
4. Click **Deactivate** or **Remove from One Step Update.** Follow the prompts to confirm the deactivation.

Note: The name of the buttons referenced above may vary depending on the services you currently use and the version of Quicken you are using.

5. Click on the **General** or **General Information** tab. Delete the Account Number.
6. Delete the name of the Financial Institution. Click **OK** to close the window.
7. Repeat steps 2 – 7 for each account at The Bank of Carbondale.

Re-activate Your Account(s) on eBanking

1. Open the account register that you want to enable for online account access.
2. Choose **Account Actions → Set Up Online**.
3. Enter The Bank of Carbondale and click **Next**.
4. Type your User ID and Password. Click **Connect.**

Note: You may be presented with a security question from your Financial Institutions prior to receiving your accounts.

5. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link** or **Exists in Quicken** and select the matching accounts in the drop-down menu.

DO NOT select **New** or **Add In Quicken**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

6. After all accounts have been matched, click **Next.**
7. You will receive confirmation that your account(s) have been added → Click **Done** or **Finish**.

Thank you for making these important changes!