Quicken for Windows 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 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) on Online Banking

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 version of Quicken.

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. 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. You will want to select **Link to an existing account or Use an existing Quicken account** and select the matching account in the drop-down menu.

DO NOT select **Create a new account or Create a new Quicken account**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken or click the Cancel button**.

4. Repeat steps 2 – 3 for all of your accounts.

Thank you for making these important changes!