Quicken for Windows Conversion Instructions

Quicken for Windows 2010–2013

Web Connect

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ABOUT THIS DOCUMENT—INFORMATION & CHANGE HISTORY .... ERROR! BOOKMARK NOT DEFINED.

Introduction

As **Merchants Bank of Alabama** completes its system *upgrade,* 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 **Username and Password** for the Merchants Bank of Alabama website.

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.

NOTE:	This update is time sensitive and can be completed on or after **12/10/2012**.

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for ***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 ***Checking for Updates to Quicken*** and follow the instructions.

Task 2: Connect to Merchants Bank of Alabama

3. Log in to ***Merchants Bank of Alabama*** web site at http://www.merchantsbankal.com. Download your transactions into Quicken.
4. Once the transactions are downloaded, accept all transactions into your Quicken account register.
5. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Deactivate Your Account(s) At Merchants Bank of Alabama

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 vary depending on the services and the version of Quicken you are using.

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

Task 4: Re-activate Your Account(s) at Merchants Bank of Alabama

1. Log in to ***Merchants Bank of Alabama*** web site at http://www.merchantsbankal.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.

IMPORTANT:	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!