

# Quicken for Windows Conversion Instructions

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*Express Web Connect*

## Introduction

For BankSouth customers who use Quicken for Windows, their Quicken settings will need to be updated to ensure transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, use your **login credentials** for BankSouth Online Banking.

It is important that you perform the following instructions exactly as described and in the order presented. This conversion should take 15–30 minutes.

## Documentation and Procedures

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### **Task 1:** Conversion Preparation

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1. Back up 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 an update, choose **Help** menu > **Quicken Help**. Search for **Update Software** and follow the instructions.

### **Task 2:** *Optional task* - Complete a final download **after November 12, 2019**

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1. Choose **Tools** menu > **One Step Update**.
2. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.
3. In the **One Step Update Settings** dialog, make sure all items are checked and click **Update Now**.
4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

**NOTE:** If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

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**Task 3:** Disconnect Accounts in Quicken on or after **November 12, 2019**

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1. Choose the **Tools** menu > **Account List**.
2. Click the Edit button of the account you wish to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate**. Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. Repeat steps for each account to be disconnected.

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**Task 4:** Reconnect Accounts in Quicken on or after **11/12/19**

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1. Choose the **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to activate.
3. In the **Account Details** dialog, click the **Online Services** tab.
4. Click **Set Up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter **BankSouth** in the search field, select the name in the list and click **Next**.
7. If presented with the Select Connection Method screen, select **Express Web Connect**.
8. Enter your **User ID** and **Password**. Click **Connect**.

**NOTE:** You may be presented with a security question by BankSouth prior to receiving your accounts.

9. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select Link to an existing account and select the matching accounts in the drop-down menu.

**IMPORTANT:**

Do NOT select Add to Quicken unless you intend to add a new account to Quicken. If you are presented with new accounts you do not want to track in this data file, select Ignore - Don't Download into Quicken.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.

11. Click **Done** or **Finish**.