

# Quicken for Mac Conversion Instructions

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*Express Web Connect*

## Introduction

For BankSouth customers who use Quicken for Mac, Quicken settings will need to be updated to ensure the smooth transition of your data. To complete these instructions, use your login credentials for BankSouth Online Banking.

**NOTE:** Quicken Express Web Connect uses the same User ID and Password as your financial institution's website.

It is important that you perform the following instructions exactly as described and in the order presented. This conversion should take 15–30 minutes. ***Thank you for making these important changes!***

## Documentation and Procedures

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

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1. Backup your data file. For instructions to back up your data file, choose the **Help** menu > Search. Search for **Backing Up**, select **Backing up data files**, and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates**, select "**Check for Updates**" and follow the instructions.

### **Task 2:** *Optional task* - Complete a final download before you install conversion

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1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Repeat this step for each account (such as checking, savings, credit cards) you use for online banking.

### **Task 3:** Disconnect Accounts in Quicken on or after 11/12/19

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1. Select your account under the Accounts lists on the left side.
2. Choose Accounts men > Settings.
3. Select Troubleshooting > Deactivate Downloads.
4. 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. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download**.
4. Enter **BankSouth** in the **Search** field, select the name in the **Results** list and click Continue.
5. Enter your **User ID** and **Password** and click **Continue**.
6. If there is extra information required by BankSouth, enter it to continue.

**NOTE:** Select "Express Web Connect" or "Quicken Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select "**Link**" to pick your existing account.

**IMPORTANT:** Do NOT select "**ADD**" under the action column.

8. Select **Finish**.