Southern Bancorp
Building communities. Changing lives.

As Southern Bancorp completes its system conversion to our new online banking system**,** 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.

NOTE:	This update is time sensitive and can be completed on or after ***February 21, 2013 at 8:00 am.***

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

Task 2: Deactivate Your Account(s) At Southern Bancorp

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 ***Southern Bancorp.***

Task 3: Re-activate Your Account(s) at Southern Bancorp

1. Open the account register that you want to enable for online account access.
2. Choose **Account Actions** menu > **Set Up Online**.
3. Enter ***Southern Bancorp*** and click **Next**.
4. Type your **User ID** and **Password**. Click **Connect**.

NOTE:	You will be presented with a list of accounts available for online access.

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.

IMPORTANT:	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**.

   You will receive confirmation that your account(s) have been added.

7. Click **Done** or **Finish**.

Thank you for making these important changes!