



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

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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 **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.

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### Task 2: Deactivate Your Account(s) At [Financial Institution A]

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1. Select your account under the "**Accounts**" list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Remove the checkmark from "**I want to download transactions**".
4. Click **Save**.
5. Click **Continue** when asked to confirm this deactivation.
6. Repeat steps 2 – 5 for each account at **Southern Bancorp**.

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### Task 3: Re-activate Your Account(s) at [Financial Institution B]

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1. Log in to **ivault.banksouthern.com**

2. Download your transactions to Quicken.

**NOTE:** DO NOT select "ADD" under the action column. In the Action column, just select your existing account.

3. Repeat step 2 for each additional account.

*Thank you for making these important changes!*