



Quicken® for Windows® Florida Bank of Commerce Account Conversion Instructions

As Florida Bank of Commerce completes its system conversion to Direct Connect, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your Access ID and passcode for Florida Bank of Commerce and the ability to log in to the Florida Bank of Commerce Web site.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online service may stop functioning properly. This conversion should take 10 minutes.

Note: In the following screen shots, red icon numbers match step number instructions. All financial institution and register information is fictitious and for illustration only.



Within this guide, this symbol displays to indicate that there are optional FAQs.

A. BACK UP YOUR CURRENT DATA

1. Choose **File** menu → **Backup**.
2. In the Quicken Backup dialog, specify which file to back up and where you want the backup saved, and then click **OK**.

B. UPDATE THE FINANCIAL INSTITUTION LIST

Quicken 2010



1. Click the **Update** icon on the Quicken toolbar.
2. Uncheck all boxes → Update Now in the One Step Update Settings dialog.
3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.

4. When the update is completed, close Quicken. Reopen Quicken.

Quicken 2008-2009

1. Open Quicken > Go to Online > One Step Update.

2. Uncheck all boxes → Update Now in the One Step Update Settings dialog.

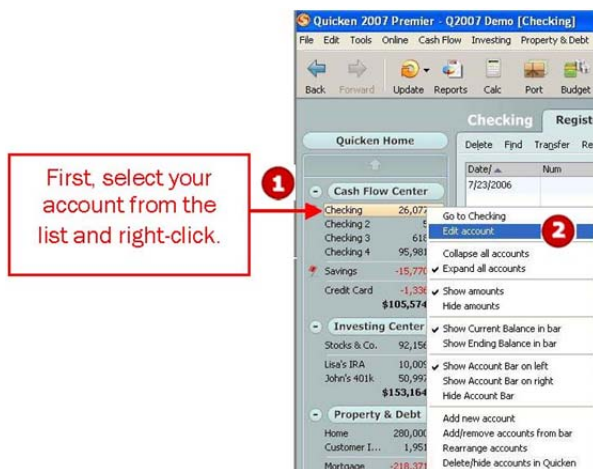
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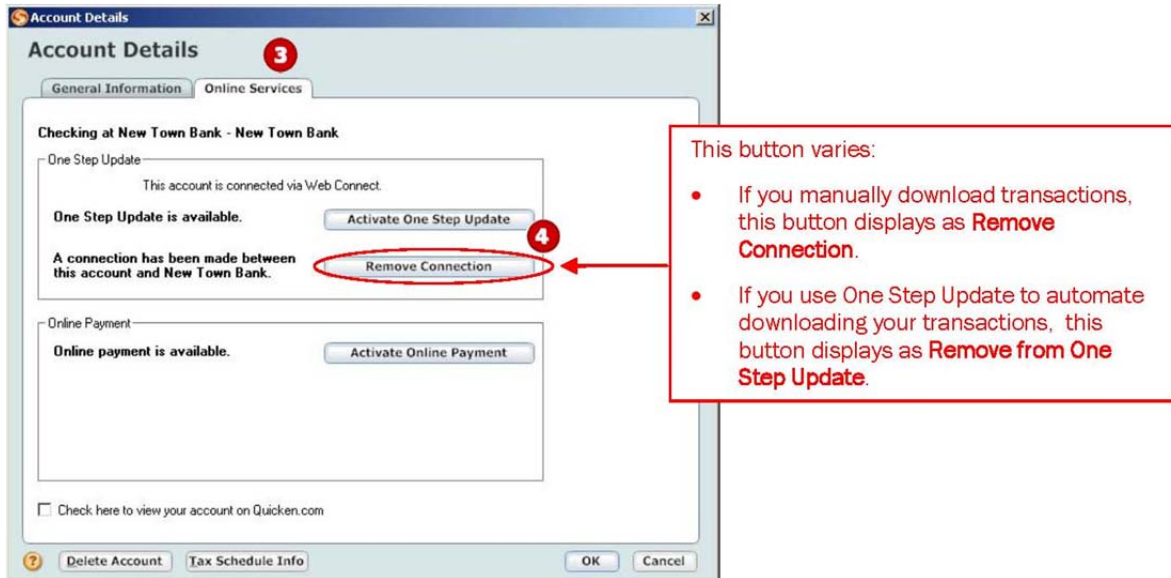
C. DEACTIVATE YOUR ACCOUNTS WITH FLORIDA BANK OF COMMERCE

1. Right-click your first Florida Bank of Commerce account in the Cash Flow Center.

2. Select **Edit account** from the pop-up menu.



3. Click the **Online Services** tab.



4. Click **Remove Connection** or **Remove from One Step Update** in the One Step Update area. Confirm the remaining prompts.

5. Click the **General Information** tab. In the Financial Institution field, type Florida Bank of Commerce. Optionally, edit the Account Name field to reflect the new financial institution.

6. Click **OK** to close the Account Details dialog.

Repeat steps **1** through **6** for each Florida Bank of Commerce account (such as checking, savings, credit cards, and brokerage). Verify that each account is deactivated by choosing **Tools** menu → **Account List**. As each online account is deactivated, the word **Activated** disappears for each account in the **Online Services** column.

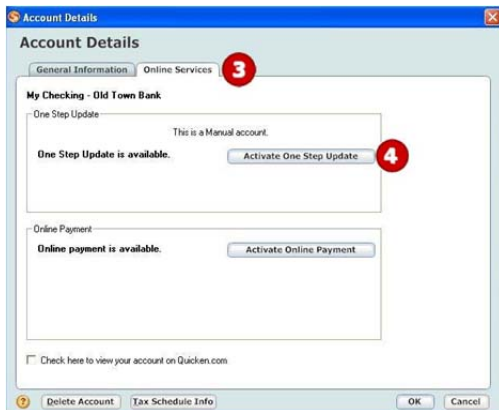
D. ACTIVATE YOUR ACCOUNTS WITH FLORIDA BANK OF COMMERCE

1. Right-click your first Florida Bank of Commerce account in the **Cash Flow Center**.

2. Select **Edit account** from the pop-up menu.



3. Click the **Online Services** tab.



4. Click **Activate One Step Update** in the One Step Update area. Confirm the remaining prompts.

5. If you have more than one account, then match each Quicken account to the appropriate Florida Bank of Commerce account in the drop-down list, and complete the remaining prompts.

If you have more than six accounts, then repeat steps **1** through **5** for each additional set of six accounts that you use with online services.

IMPORTANT!

ACTIVATE YOUR QUICKEN FOR DIRECT CONNECT WITH FLORIDA BANK OF COMMERCE

The first time you attempt to activate your first Account at Florida Bank of Commerce, you will receive an error:

“We’re sorry, but we had a connection error.”

If you read below in the “An additional message from Florida Bank of Commerce”

“Pending Authorization: Visit the Personal Finance Software Access link under the User Services tab on Florida Bank of Commerce’s Internet Banking site.”

Follow these steps to Activate Direct Connect for Florida Bank of Commerce

1. Login to Internet Banking
2. Click the User Services tab
3. Click on the "Personal Finance Software Access"
4. Click "Enable" link against the Quicken request.
5. Return back to Quicken and check the radio button "Try again" (the refresh). Then click "Next"