Quicken for Mac
Conversion Instructions

Direct Connect

Introduction

As **BancorpSouth** completes its system conversion**,** you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time-sensitive.

To complete these instructions, you will need your login credentials for Direct Connect.

> **NOTE:** Direct Connect may require registration. Please contact BancorpSouth to verify your Direct Connect login information.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

This detour symbol indicates instructions in a Task specifically for **Bill Pay within Quicken.** If you do **not** use Quicken to make bill payments, skip that Task.

Documentation and Procedures

Task 1: Conversion Preparation

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1. Backup your data file. Go to **File** > **Save a Backup**

2. Download the latest Quicken Update. Go to **Quicken** > **Check for Updates**

Task 2: *Optional task* - Complete a final download

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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, and brokerage) you use for online banking or investing.

Task 1: Cancel Outstanding Payments

If you are **not** a Bill Pay user within Quicken, skip this Task.

IMPORTANT:	This Task must be completed to avoid possible duplicate payments. If you do not cancel payments scheduled to be paid on or after *6/8/2020*, these payments may still be processed.

1. Highlight a Bill Payment transaction on the account register.

NOTE:	While on the account register, go to **File** > **Print** to save your list of pending payments. You can use this when you recreate and send these payments later.

2. Click on the **Edit** button located on the action bar at the bottom of the account register window.

3. Click on the **Edit Details** tab located below the highlighted transaction.

4. Click on the **Online Payment** tab.

5. Click on **Cancel Payment**.

6. Repeat steps for each outstanding payment transaction you have with your financial institution.

Task 3: Disconnect Accounts in Quicken

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1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Settings**.

3. Select **Troubleshooting** > **Deactivate Downloads.**

4. Repeat steps for each account to be disconnected*.*

Task 4: Reconnect Accounts to BancorpSouth

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** BancorpSouth **in the Search field, select the institution name in the Results list and click Continue.**

5. Enter your Direct Connect **User Id** and **Password** and click **Continue**.

6. If the bank requires extra information, enter it to continue.

> **NOTE:** Select "Direct Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, 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 unless you intend to add a new account to Quicken.

8. Select **Finish**.

Task 2: Recreate Online Payments at BancorpSouth

If you are **not** a Bill Pay user within Quicken, your conversion is complete. Skip this Task.

1. Recreate your payments.

2. If you need help creating your payments, click on **Help** in the top menu.

3. Search for "**Adding online Bill Pay transactions**" and click that item.

4. Follow the instructions to enter or transmit an online payment.