



Business Recommendations:

Quicken/QuickBooks: No action on your part is needed. We do, however, recommend you complete a final download before you convert and disconnect your accounts.

Quicken/QuickBooks will become available for use again once you are on the new platform.

[Click here for Quicken instructions](#)

[Click here for QuickBooks instructions](#)

ACH: At conversion on 5/25/21, you will need to verify that your ACH templates migrated. We suggest you extract and save your ACH templates before 5/23/21.

- Log into Business Online Banking
- Management Tools
- ACH Manager
- Submit
- Select the template name in the blue hyperlink
- Export
- Open and Save

Wires: At conversion, you will need to verify that your Wire templates migrated to the new system. We recommend you copy your Wire templates or convert them to PDF and save.

Alerts: Your alerts will not transfer over to the new system. You may want to keep track to recreate them. At conversion, you can go to Settings on the left hand side to create your customized alerts.