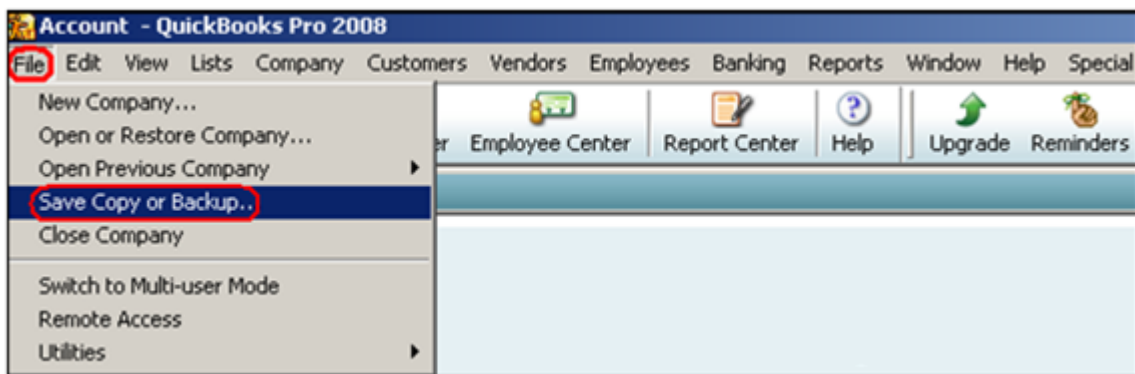


# Name Change QuickBooks 2008 2009 Windows from Carolina First or Mercantile Bank to TD Bank Online Banking

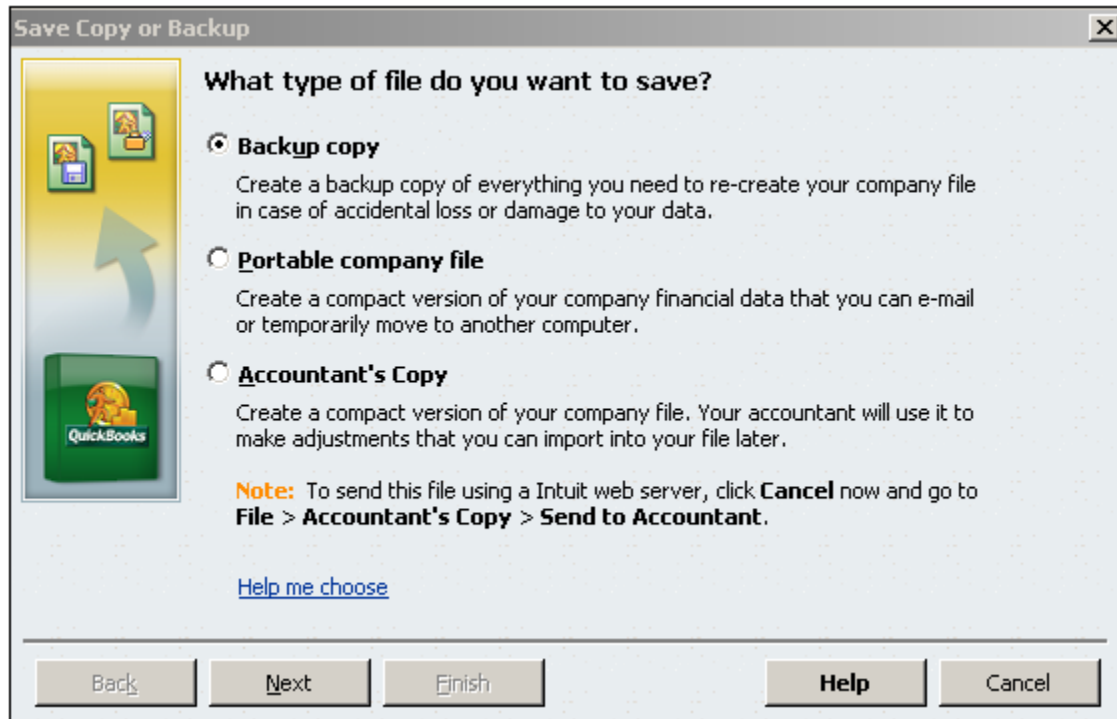
Note: Prior to following the below steps, please update your software to the most recent release/revision. You may find further detail about updating Quickbooks at the following site:

<http://support.quickbooks.intuit.com/support/productupdates.aspx>

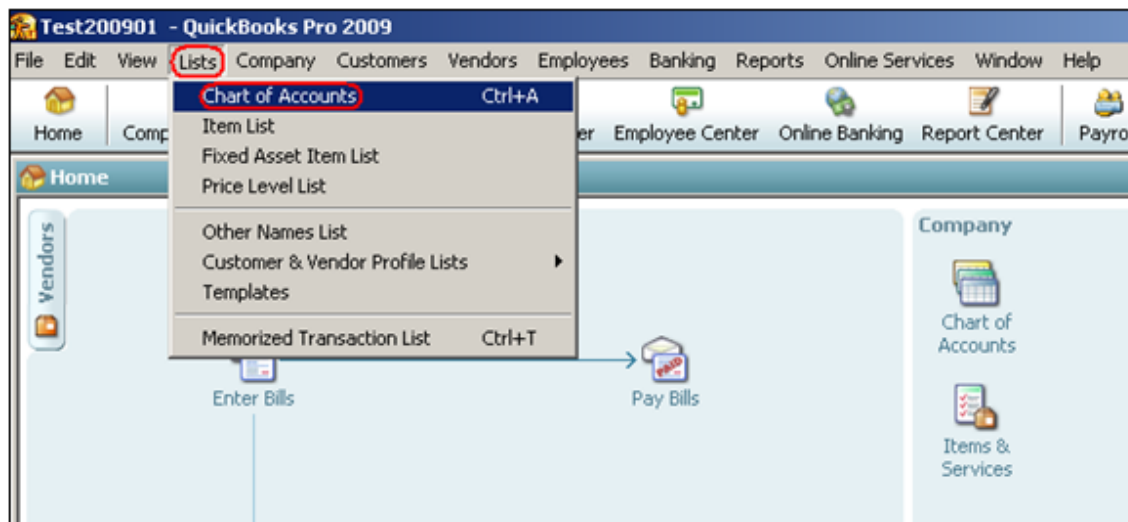
1. Backup your QuickBooks file as you normally do.



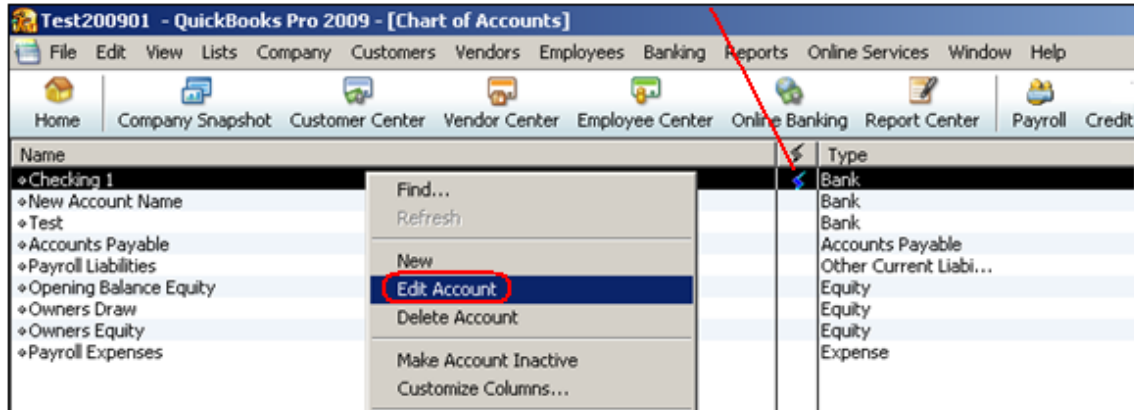
If you have not backed up, or have any questions click on help me choose, or help; this will direct you to the Quickbooks help documentation instructing how to create a backup copy.



2. Select lists, and then chart of accounts.



3. To assure all accounts are listed, check the “Show Inactive Accounts” box at the bottom of the screen. Then, highlight an account, right click, and then left click on edit account. The lightning bolt shows an account is activated



4. Select the online services tab, highlight and delete the account customer ID, uncheck the boxes for Statement Downloads and Online Bill Payments, and click Deactivate All Online Services.

General **Online Services**

Account Name Account Name

Activate Online Services

Connection Information

Financial Institution TD Bank-Online Banking

Account Customer ID

Last Download:

Statement Downloads

Online Bill Payments

**Deactivate All Online Services**

If you deactivate all services, you will have to set them up for this account again.

Once the screen appears as below, click save & close.

Statement Downloads

Online Bill Payments


**Deactivate All Online Services**

If you deactivate all services, you will have to set them up for this account again.

Account is inactive

**Save & Close** Cancel

**QuickBooks Information**

 You have just disabled one or more online services for this account. Please note that this does not cancel the services for which you have enrolled this account at your financial institution. You will continue to be charged for these services until you contact your financial institution directly to cancel them.

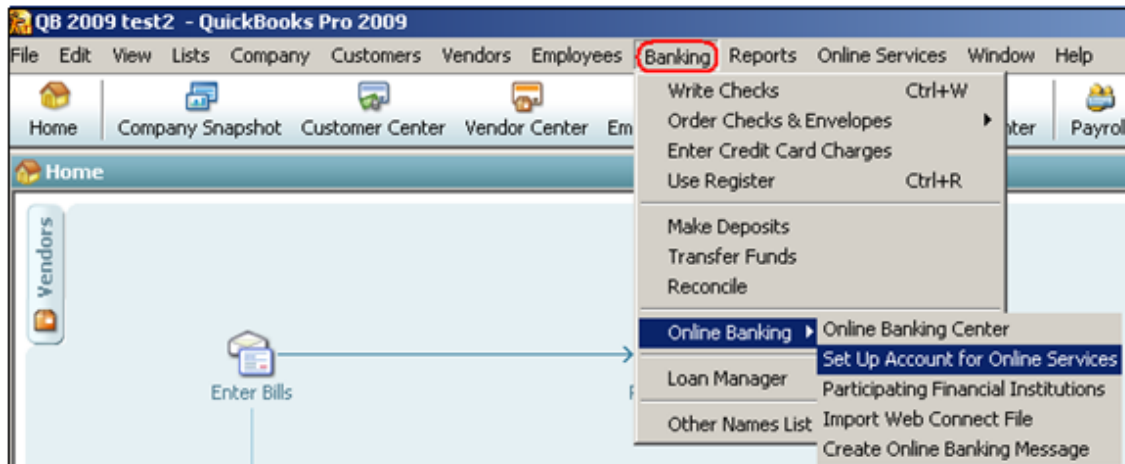
**OK**

6. When the message above appears, click ok.

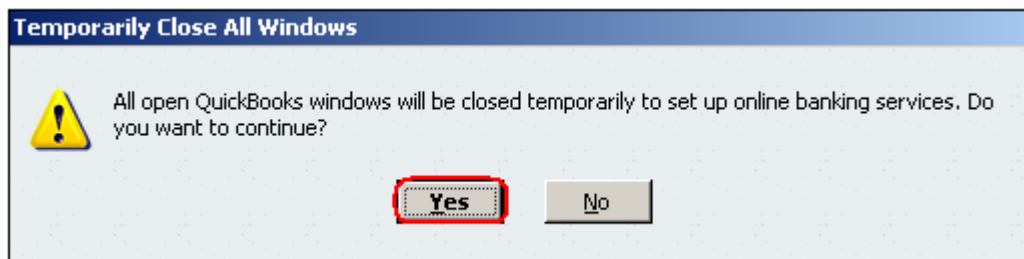
7. Repeat steps 3-6 for all Carolina First or Mercantile Bank Accounts listed

8. Close Quickbooks and Re-open Quickbooks.

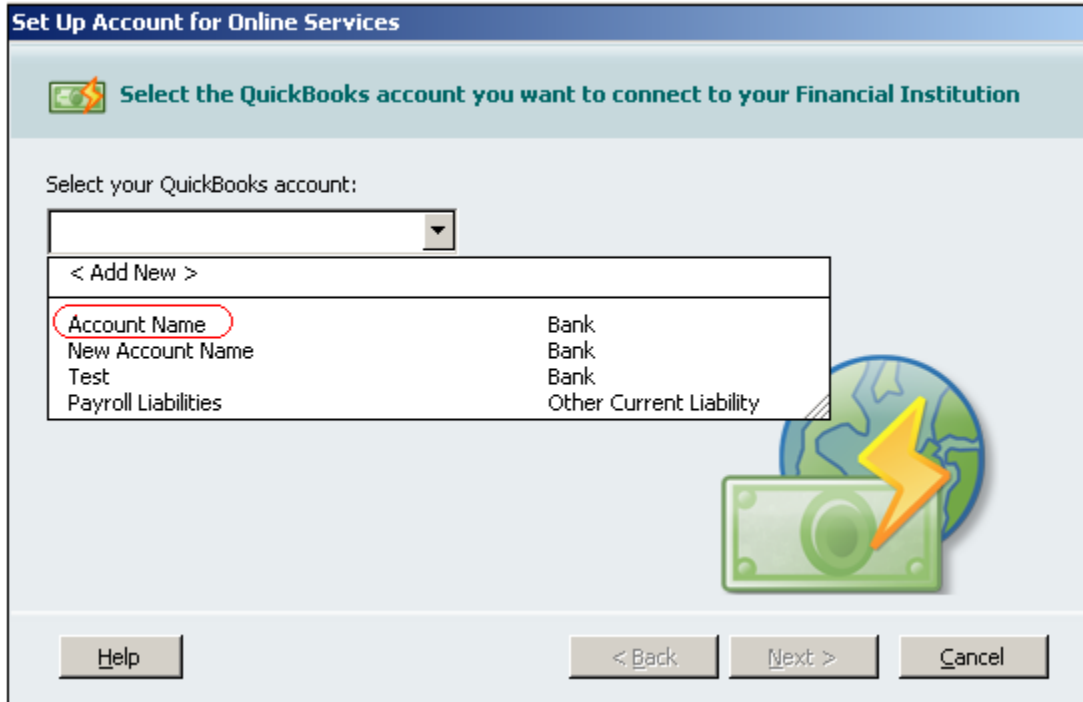
9. Select banking, online banking, set up account for online services.



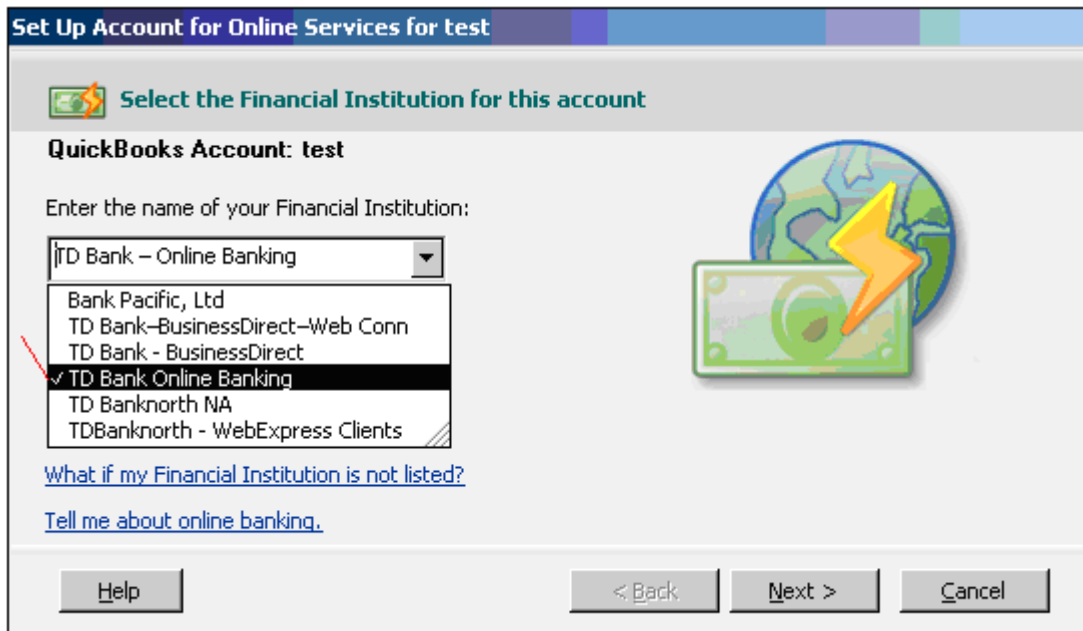
9. When the window below appears, click Yes.



10. Select QuickBooks account. Select next.



11. Type in TD and then select TD Bank Online Banking. Click next.



Continued

12. Enter bank username once and bank password two times. Click sign in.

**Set Up Account for Online Services for test**

**TD Bank Online Banking**

Customer ID:   
Use your Access Number

Password:   
Use your PIN

Confirm Password:

To sign in to your bank with a secure Internet connection, select **Sign In**.

Need a Customer ID and Password?

- Your QuickBooks login is the same as the login to your TD Bank – Online Banking Web site.

[TD Bank Online Banking Support](#)

- (888) 751-9000 to sign up

No fee for statement download

13. Highlight and match the QuickBooks account to the bank account number. If the customer has more than one account, they will need to complete the entire set-up process for each.

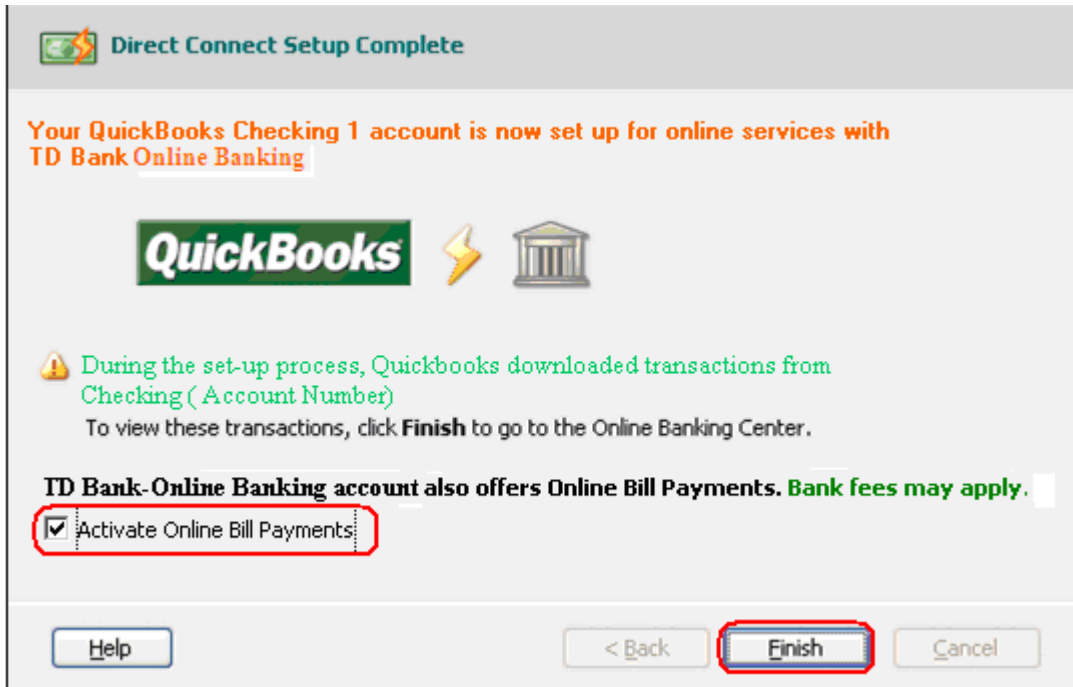
**Set Up Account for Online Services for Account Name**

**Select the TD Bank Online Banking account you want to connect to QuickBooks**

**Select your TD Bank-Online Banking account**

Account Name	Account Number	Account Type	Routing Number
Account Description	Account Number	Checking or Savings	Routing Number
Account Description	Account Number	Checking or Savings	Routing Number
Account Description	Account Number	Checking or Savings	Routing Number

14. Activate bill pay if applicable, and then select finish.



15. This will go to the online center where you'll be able to download transactions!

- If you have more than one account, repeat steps 9-14 for each account.

