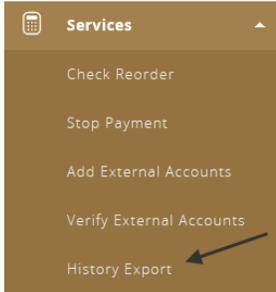


Download multiple accounts at one time:

1. Log in to Online Banking.
2. Under 'Services' menu, click on **History Export**. This option is also available by clicking on 'Other Services'.



3. From the **History Export** screen, check the box next to each account you would like to download.

History Export

ACCOUNTS *

Personal Savings HSA Individual Checking

Select All Select None

EXPORT TYPE *

Comma Delimited CSV

START DATE * END DATE *

Select Date Select Date

Submit

4. Choose the **Export Type** – Comma Delimited CSV, Quicken QFX, or Quickbooks QBO.

EXPORT TYPE *

Comma Delimited CSV

Quicken QFX

Quickbooks QBO

Note – if Comma Delimited CSV is chosen, all accounts selected will be in one spreadsheet – it will not separate by account.

5. Choose the **Start Date** and **End Date**.

History Export

ACCOUNTS *

Personal Savings HSA Individual Checking

Select All Select None

EXPORT TYPE *

Comma Delimited CSV

START DATE * END DATE *

Select Date Select Date

Submit

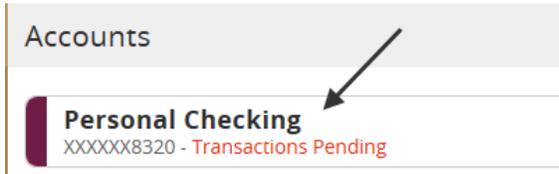
6. Click **Submit**.
7. When prompted to Open or Save file, click **Open**.
8. This will open the file, either in Excel, Quicken, or Quickbooks.
9. Screen will appear below in online banking. Click on the menu bar on the left hand side of the screen to continue using online banking.

History Export

The account History you requested has been compiled successfully and your download should begin momentarily. If not please click [here](#) to manually begin the download.

Download account information individually:

1. Log in to Online Banking.
2. From the **Account Overview** screen, click on the account.



3. Click on **Show Filters** to choose the date range or transactions that you would like to download

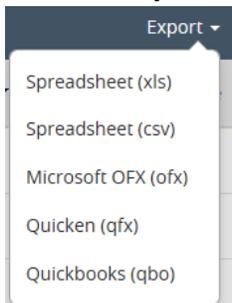
DESCRIPTION	TYPE	TIME PERIOD
<input type="text"/>	All <input type="checkbox"/>	Custom Date <input type="checkbox"/>
CHECK #	AMOUNT	START DATE
<input type="text"/> to <input type="text"/>	<input type="text"/> to <input type="text"/>	9/12/2016 <input type="checkbox"/> to 9/19/2016 <input type="checkbox"/>

4. Once the date range has been set, click on **Apply Filters**.

DESCRIPTION	TYPE	TIME PERIOD
<input type="text"/>	All <input type="checkbox"/>	Custom Date <input type="checkbox"/>
CHECK #	AMOUNT	START DATE
<input type="text"/> to <input type="text"/>	<input type="text"/> to <input type="text"/>	9/12/2016 <input type="checkbox"/> to 9/19/2016 <input type="checkbox"/>

Hide Filters Reset Apply Filters

5. Click on **Export** and choose the type of export file.



6. When prompted to Open or Save file, click **Open**.
7. This will open the file, either in Excel, Quicken, or Quickbooks.

Basic Troubleshooting Steps for Quicken and Quickbooks:

If Quicken or Quickbooks is unable to locate your account when downloading information, please try to deactivate online services. Once deactivated, it can be reactivated by following the download steps outlined in the beginning of this document.

Please note: Depending on the version of Quickbooks and Quicken, the steps below may vary slightly.

Quickbooks:

1. Click on **Lists** from the top menu and then choose **Chart of Accounts**.
2. Right click on the Mercantile account and choose **Edit Account**.
3. Within the **Edit Account** box, choose the tab for **Bank Feed Settings**.
4. Click on the radio button for **Deactivate All Online Services**. Note – all transactions must be added to the register before it will allow you to deactivate.
5. Click on **Save & Close**.

Quicken:

1. From the **Banking** menu, right click on the Mercantile account and choose **Edit/Delete Account** from the drop down menu.
2. Within the **Account Details** box, choose the tab for **Online Services**.
3. Under **Online Setup**, click on the button for **Deactivate**.

Please note, Quickbooks and Quicken only support the previous THREE (3) versions. If you attempt to download history in to a Quickbooks version that is no longer supported, you will receive an error message stating “Quickbooks is unable to verify the Financial Institution Information for this Download.” For additional support on Quickbooks and Quicken, please visit the corresponding Intuit webpage.