



Quicken for Mac 2015-2017 Conversion Instructions

Express Web Connect

As **Evans Bank** completes its online and mobile banking upgrade, you will need to modify your Quicken settings to ensure the smooth transition of your data.

To complete these instructions, you will need your User ID and Password for Evans Online Banking.

Thank you for making these important changes!

NOTE: **Quicken Express Web Connect** uses the same User ID and Password as your financial institution's website.

Disconnect Accounts

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.

Reconnect Accounts

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 **Evans Bank** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Enter your **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

NOTE: Select "Express Web Connect" or "Quicken Connect" for the "Connection Type" if prompted.

7. In the "**Accounts Found**" screen, ensure you 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.

8. Select **Finish**.