



# Quicken for Mac 2007 Conversion Instructions

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## *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!*

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## Disconnect Accounts at **Evans Bank**

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1. Choose **Lists** menu > **Accounts**.
2. Select the account to deactivate and click **Edit**.
3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
4. Remove the information within the **Account Number** and **Routing Number** fields.
5. Click **OK** to save your edits.
6. Repeat steps 2 – 5 for each account to be disconnected.
7. Verify your account list does not display a blue online circle icon for the accounts you are disconnecting.

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Re-Connect Accounts at **Evans Bank**

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1. Download your Quicken Web Connect file from **Evans Online Banking**.

**NOTE:** Take note of the date you last had a successful connection. If you have overlapping dates in the Web Connect import, you may end up with duplicate transactions.

2. Import your transactions to Quicken.
3. Associate the account to the appropriate account already listed in Quicken. Select **Use an existing account**.
4. Match the transactions you are importing to the corresponding existing Quicken account in the drop-down list and click **OK**.
5. Repeat steps for each account to be reconnected.
6. Choose **Lists** menu > Accounts. Verify each account at **Evans Bank** has a blue online circle indicating it has been reactivated for online services.