Bank of Lexington
People who know banking *People who know you*

# Quicken for Mac 2015-2017 Conversion Instructions

***Express Web Connect***

## Introduction

As ***Bank of Lexington*** completes its system conversion*,* you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your User ID and Password for the **Bank of Lexington** website.

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

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

***Thank you for making these important changes!***

# Documentation and Procedures

**Task 1:** Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for ***Backing Up***, select **Backing up data files**, and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for ***Updates***, select "Check for Updates," and follow the instructions.

**Task 2:** Connect to ***Bank of Lexington*** for a final download before ***4:00pm Eastern - Thursday, August 30, 2018***

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Update Selected Online Account**.

3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) you use for online banking or investing.

**Task 3:** Disconnect Accounts at ***Bank of Lexington*** on or after ***4:00pm Eastern - Thursday, August 30, 2018***

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.

**Task 4:** Reconnect Accounts to ***Bank of Lexington*** on or after ***Tuesday, September 11, 2018***

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 ***Bank of Lexingto*** 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**.