Quicken for Mac Conversion Instructions

Quicken for Mac 2015-2016

Web Connect

Introduction

As Penn Liberty Bank completes its system conversion to WSFS Bank, you will need to modify your Quicken settings to ensure the smooth transition of your data. Before continuing with these instructions, please have your WSFS Online Banking user ID and password ready.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15-30 minutes.

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: Deactivate Your Account(s) at ***Penn Liberty Bank*** on or after ***August 12, 2016***

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 at ***Penn Liberty Bank.***

Task 3: Reactivate Your Account(s) at ***WSFS Bank*** on or after ***August 15, 2016***

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 ***WSFS Bank*** in the **Search** field, select the name in the **Results** list and click **Continue**.

5. Log in to your WSFS Online Banking account at wsfsbank.com***.*** **Download** a file of your transactions to your computer.

6. Take note of the date you last had a successful connection. If you have overlapping dates in the web connect process, you may end up with duplicate transactions.

7. Drag and drop the downloaded file into the box **Drop download file**.

> **NOTE:** Select “Web Connect” for the “Connection Type” if prompted.

8. 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 unless you intend to add a new account to Quicken.

9. Click **Finish**.

10. Repeat steps for each account you are reactivating in Quicken.

Thank you for making these important changes!