

Quicken for Windows Conversion Instructions



Quicken for Windows 2013-2016

Express 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.

NOTE: Quicken Web Connect/Express Web Connect accounts use the same user ID and password as WSFS Online Banking.

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 > **Quicken Help**. Search for **Backup Data File** and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Quicken Help**. Search for **Update Software** and follow the instructions.

Task 2: Deactivate Your Accounts at *Penn Liberty Bank* on or after **August 12, 2016**

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate**. Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. Repeat steps 2-6 for each account to be deactivated.

Task 3: Re-activate Your Accounts at *WSFS Bank* on or after **August 15, 2016**

1. Choose **Tools** menu > **Account List**.

2. Click the **Edit** button of the account you want to activate.
3. In the Account Details dialog, click on the **Online Services** tab.
4. Click **Set Up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter **WSFS Bank** and click **Next**.
7. If presented with the Select Connection Method screen, select **Express Web Connect**.
8. Enter your **User ID** and **Password for WSFS Online Banking**. Click **Connect**.

NOTE: You may be presented with a security question from WSFS Bank prior to receiving your accounts.

9. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching accounts in the drop-down menu.

IMPORTANT: Do **NOT** select **Add to Quicken** unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
11. Click **Done** or **Finish**.

Thank you for making these important changes!