

Quicken for Mac Conversion Instructions

Express Web Connect

Introduction

As Beneficial Bank completes its system conversion to WSFS Bank, 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 login credentials for online banking.

NOTE: **Quicken Express Web Connect** uses the same User ID and Password as your 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 not function 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: Disconnect Accounts in Quicken on or after **August 23, 2019**

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 3: Reconnect Accounts to **WSFS Bank** on or after **August 26, 2019**

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. Enter your **User Id** and **Password** and click **Continue**.
6. You may be presented with a security question from WSFS Bank prior to receiving your accounts.

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**.