Quicken for Mac
Conversion Instructions

Express Web Connect to Web Connect

Introduction

As ***Mid Penn Bank Legacy Business Banking*** completes its system conversion to ***Mid Penn Bank New Business Banking,*** 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.

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. Go to **File** > **Save a Backup**
2. Download the latest Quicken Update. Go to **Quicken** > **Check for Updates**

Task 2: Disconnect Accounts in Quicken

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 ***Mid Penn Bank New Business Banking CC***

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 ***Mid Penn Bank Business Banking CC*** in the **Search** field, select the name in the **Results** list and click **Continue**.

5. Log in to ***Mid Penn Bank.com Business Banking New***.

6. Choose "Accounts" and then choose the account from the drop-down list for which you want to download transactions.

7. Click on the "History" tab above and to the right of the transaction information.

8. Enter the date range for which you want to download transactions.

9. Choose the "Actions" menu option.

10. Download and save the following Web Connect file type from online banking to your PC.

    a. Export Quicken (Mac) (.qfx)

NOTE:	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.

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

NOTE:	Select "Web Connect" for the "Connection Type" if prompted.

12. 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.

13. Click **Finish**.

14. Repeat steps for each account to be reconnected.