

Quicken® Desktop Conversion Instructions

Step by step instructions to help you transition your Quicken account.

In preparation for your transition to Provident Bank digital services, **we require that you backup your Quicken data prior to August 30, 2024**, utilizing the instructions below.

Please reference the dates next to each task as this information is time sensitive.

The following instructions should be followed exactly as described, and in the order presented. If these instructions are not followed, your online banking Quicken connectivity may stop functioning properly. This data backup and conversion should take 15-30 minutes.

Provident offers two connection options – Direct Connect and Web Connect, as described below. Please select the instructions for the option that best suits your needs. **Once you complete the connection on or after September 3, 2024, carefully review your downloaded transactions to ensure no transactions were duplicated or missed on the register.**

Direct Connect

Direct Connect is one of two automatic update options that communicates through a direct link with ProvidentConnect Online Banking. You do not need to log in directly to ProvidentConnect Online Banking to use this connectivity type. Once connected, updates will occur when you initiate a new download request from within Quicken.

Web Connect

Web Connect is the connectivity type that begins in ProvidentConnect Online Banking. You will download a .qfx (Quicken) file and import that file into Quicken. This process does not require credentials to be entered in Quicken since the file download occurs within ProvidentConnect Online Banking.

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Quicken Windows Direct Connect

Before August 30, 2024:

1. Back up your Quicken Windows Data File. Go to **File > Backup and Restore > Backup Quicken File**.
2. Download the latest Quicken Update. Go to **Help > Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

On or After September 3, 2024:

1. Login to ProvidentConnect Online Banking and enroll in Direct Connect. Please refer to the information mailed to you in August regarding your first-time login instructions.
 - a. Go to **provident.bank** and login to ProvidentConnect Personal Online Banking
 - b. Select **Additional Services** then **Connectivity for Quicken and Quickbooks**
 - c. Create a **Direct Connect Password**
 - d. Re-enter your **Direct Connect password**
 - e. **Check the box** to agree to the Online Banking Access Agreement after reviewing it
 - f. Click **Submit**
2. In Quicken, deactivate online banking connection for accounts connected to Lakeland Bank.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Financial Institution and Account Number information. Click **OK** to close window.
 - g. Repeat steps for any additional accounts.
3. Reconnect the online banking connection for your accounts.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account you want to activate.
 - c. In Account Details, click **Online Services** and then choose **Set up Now**.
 - d. Enter Provident Bank in the search field, select **Provident Bank - NJ** and click **Continue**.
 - e. Enter your **ProvidentConnect User ID** and your **Direct Connect Password** created during step 1.
 - f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu.

Important: Do NOT choose “Create a new account” 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, choose **Ignore – Don’t Download into Quicken** or click **Cancel**.

- g. After all accounts have been matched, click **Next** and then **Done**.

Quicken Mac Direct Connect

Before August 30, 2024:

1. Backup Quicken Mac Data File and Update the application.
 - a. Choose **File > Save a Backup**.
 - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Accept all new transactions into the appropriate registers.

On or After September 3, 2024:

1. Login to ProvidentConnect Online Banking and enroll in Direct Connect. Please refer to the information mailed to you in August regarding your first-time login instructions.
 - a. Go to **provident.bank** and login to ProvidentConnect Personal Online Banking
 - b. Select **Additional Services** then **Connectivity for Quicken and Quickbooks**
 - c. Create a **Direct Connect Password**
 - d. Re-enter your **Direct Connect password**
 - e. **Check the box** to agree to the Online Banking Access Agreement after reviewing it
 - f. Click **Submit**
2. Activate the online banking connection for accounts connected to Provident Bank.
 - a. Click your account in the Accounts list on the left side.
 - b. Choose **Accounts > Settings**.
 - c. On the **Downloads** tab, select **Change Connection**.
 - d. Enter Provident Bank in the search field, select **Provident Bank - NJ** and click **Continue**.
 - e. Enter your **ProvidentConnect User ID** and your **Direct Connect Password** created during step 1.
 - f. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under **Action**, choose **Link** to pick your existing account.

Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.

- g. Click **Finish**.

Quicken Windows Web Connect

Before August 30, 2024:

1. Backup Quicken Windows Data File and Update.
 - a. Choose **File > Backup and Restore > Backup Quicken File**.
 - b. Download the latest Quicken Update. Choose **Help > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all your transaction history up to date.
 - b. Repeat this step for each account you need to update.
 - c. Accept all new transactions into the appropriate registers.

On or After September 3, 2024:

1. Deactivate online banking connection for accounts connected to Lakeland Bank.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Financial Institution and Account Number information.
 - g. Click **OK** to close window.
 - h. Repeat steps for any additional accounts.
2. Reconnect online banking connection for your accounts.
 - a. Go to **provident.bank** and login to ProvidentConnect Personal Online Banking. Please refer to the information mailed to you in August regarding your first-time login instructions.
 - b. Download your transactions to a Quicken Web Connect (.qfx) file.
 - c. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
 - d. Use the import dialog to select the Web Connect file you downloaded. An “Import Downloaded Transactions” window opens.
 - e. Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
 - f. Repeat this step for each account you have connected to Provident Bank.

Quicken Mac Web Connect

Before August 30, 2024:

1. Backup your Quicken Mac data file and update the application.
 - a. Choose **File > Save a Backup**.
 - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Repeat this step for each account you need to update.
 - c. Accept all new transactions into the appropriate registers.

On or After September 3, 2024:

Activate online banking connection for accounts connected to Provident Bank.

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Provident Bank in the search field, select **Provident Bank - NJ** and click **Continue**.
5. Go to **provident.bank** and login to ProvidentConnect Personal Online Banking. Please refer to the information mailed to you in August regarding your first-time login instructions.
6. Download your transactions to a Quicken Web Connect (.qfx) file.

Important: 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. In Quicken, drag and drop the downloaded file into the box titled **Drop download file**. Choose **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, click **Link** to pick your existing account.

Important: Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken.

9. Click **Finish**.