

QuickBooks Desktop Instructions

Important: Eastern Bank will no longer be supporting Direct Connect on July 31, 2026. To avoid interruptions, please follow the steps below.

What's Changing

- Direct Connect will no longer work after July 31, 2026
- Customers can continue using QuickBooks Desktop and connecting to account(s) by switching to Web Connect

What You Need to Do

Before July 21, 2026 (but ideally as soon as possible), complete the steps below:

1. Cancel any bill payments or transfers initiated through Direct Connect (skip if not applicable)
2. Back up your QuickBooks company file and complete final download
3. Deactivate and Reconnect account(s)

Instructions begin on next page.

Step 1: Cancel any bill payments or transfers initiated via Direct Connect (skip if not applicable)

Only complete these tasks if you currently initiate Bill Payments from within QuickBooks Windows.

Important: These tasks must be completed as soon as possible to avoid possible duplicate payments. If you do not cancel payments these payments may still be processed.

For Windows

Cancel Existing Bill Payments.

1. Open the Register of the account you made the payment from.
2. Choose **Company > Chart of Accounts**.
3. Double-click the proper account.
4. In the register, locate the transaction to be canceled.
5. Click the transaction to be deleted.
6. Choose **Edit > Cancel Payment**.

Note: Eastern does not support Bill Payments initiated from within QuickBooks. Please use an alternative method to re-establish arrangements such as Eastern Bank Online Banking systems, or proprietary Bill Pay services offered by QuickBooks (separate fees may apply).

Step 2: Back up QuickBooks company file, update the application, and complete final download

For Windows

1. Backup QuickBooks Windows Data File & Update.
 - a) Choose **File > Back Up Company > Create Local Backup**.
 - b) Download the latest QuickBooks Update. Go to **Help > Update QuickBooks Desktop**.
2. Complete a final transaction download and match downloaded transactions.
 - a) Complete one last transaction update before change to get all transaction history up to date.
 - b) Accept all new transactions into the appropriate registers. (required)

For Mac

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

Step 3: Deactivate Direct Connect and Reconnect account(s)

For Windows

1. Deactivate online banking connection for accounts connected to financial institution requesting change.
 - a) Choose **Lists** menu > **Chart of Accounts**.
 - b) Right-click the first account you want to deactivate and choose **Edit Account**.
 - c) Click the **Bank Feeds Settings** tab in the Edit Account window.
 - d) Select **Deactivate All Online Services** and click **Save & Close**.
 - e) Click **OK** for any alerts or messages that may appear with the deactivation.
 - f) Repeat steps for any additional accounts that you need to deactivate.

2. Reconnect online banking connection for account(s) that you deactivated.
 - a) Log in to institution's online banking site and download transactions to QuickBooks (.qbo) file.
Note: Take note of your last successful upload. Duplicate transactions can occur if you have overlapping transaction dates in the new transaction download.
 - b) In QuickBooks, choose **File > Utilities > Import > Web Connect Files**. Locate your saved Web Connect file and select to import.
 - c) In the Select Bank Account dialog select Use an existing QuickBooks account. *Important: Do NOT select "Create a new QuickBooks account" unless intend to add a new account.*
 - d) In drop-down list, choose your QuickBooks account(s) and click **Continue**. To confirm, select **OK**.

For Mac

1. Deactivate online banking connection for accounts connected to financial institution requesting change.
 - a) Choose **Lists > Chart of Accounts**.
 - b) Select the first account you would like to deactivate and choose **Edit > Edit Account**.
 - c) Select **Online Settings** in the Edit Account window.
 - d) In Online Account Info window, choose **Not Enabled** from **Download Transactions**. Click **Save**.
 - e) Click **OK** for any dialog boxes that may appear with the deactivation.
 - f) Repeat steps for any additional accounts that apply.

2. Reconnect online banking connection for accounts that apply.
 - a) Log in to institution's online banking site and download transactions into QuickBooks (.qbo) file.
Important: Take note of your last successful upload. Duplicate transactions can occur if you have overlapping transaction dates in the new transaction download.
 - b) In QuickBooks, choose **File > Import > From Web Connect**. Use import dialog to import saved Web Connect file.
 - c) In the Account Association window, click **Select an Account** to choose the appropriate existing account register. *Important: Do NOT select "NEW" under the action column unless you intend to add a new account to QuickBooks.*
 - d) Click **Continue** and **OK** for any dialog boxes that require action.