Quicken Instructions

Important: Eastern Bank will no longer be supporting Direct Connect as of 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 Quicken and connecting to account(s) by switching to one of the following: **Express Web Connect (recommended, automatic)** or Web Connect (manual download)

What You Need to Do / Steps to Follow
Before July 21, 2026 (but ideally as soon as possible), complete the steps:
1. Cancel any bill payments or transfers initiated through Direct Connect (skip if not applicable)
2. Back up and download your Quicken data file
3. Deactivate and Reconnect your account(s) using **Express Web Connect / Quicken Connect (recommended, automatic)** or Web Connect (manual download)

To navigate this document, click the link or links below that match your product and connectivity.

Step 1, Bill Pay / transfers: If you currently use Direct Connect in Quicken to initiate Bill Payments, please complete the tasks at the link below. If you do not, skip.

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Quicken Mac Bill Pay - Page 3

Steps 2-3, Instructions for One-Step Update initiated from within Quicken for Express Web Connect / Quicken Connect *Recommended, auto sync

Quicken Windows Direct Connect and Express Web Connect - Page 4

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Steps 2-3, Instructions for Downloading a Web Connect file from your Online Banking Site (if not opting for above recommended option)

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Quicken Windows Bill Pay

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

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

Cancel Existing Bill Payments.

1. Choose **Tools > Online Center.**
2. Choose your institution from the Financial Institution drop-down list.
3. On the Payments tab, choose an account from which a payment is scheduled in the future.
4. In the payments status list, you will cancel payments for each payee with a status that is scheduled for delivery on a date. after the 1st Action Date. To do this, select the first payee and click **Cancel Payment**.
5. Repeat steps 3 & 4 for all payments that are scheduled for delivery after the 1st Action Date.
6. On the toolbar, click **Repeating**.
7. Choose a payment instruction and click **Delete**. Click **Delete** again in the confirmation window.
8. Repeat step 7 for each repeating payment you have with your financial institution.

Note: Eastern Bank does not support Bill Payments initiated from within Quicken Windows. Please use an alternative method to re-establish your bill pay arrangements.

Quicken Mac Bill Pay

Only complete these tasks if you currently initiate Direct Connect Bill Payments from within Quicken Mac.

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

Cancel Existing Bill Payments.

1. Highlight a Bill Payment transaction on the account register.
2. While on the account register, choose **File > Print** to save your list of pending payments. You can use this when you re-create the bill payments and send these payments again.
3. Click **Edit** at the bottom of the account register window.
4. Click **Edit Details** below the highlighted transaction.
5. Click the Online Payment tab and choose **Cancel Payment**.
6. Repeat these steps for each outstanding Bill Payment you have scheduled with your financial institution.

Note: Eastern Bank does not support Bill Payments initiated from within Quicken Mac. Please use an alternative method to re-establish your bill pay arrangements.

Quicken Windows Direct Connect and Express Web Connect

Backup and download Quicken Company file

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.

Deactivate and reconnect

1. Deactivate online banking connection for accounts connected to the financial institution that is requesting this change.
    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 that apply.
2. 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. Type your institution's name in the search field and click Next.
    e. Enter your financial institution credentials.
        - Express Web Connect uses the same credentials you use for your institution's online banking login.
    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 and Quicken Connect

Backup and download Quicken Company file

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.

Deactivate and reconnect

To Deactivate an account

1. Select the account to open its register.
2. Click the **Settings** gear icon in the lower right corner of the register.
3. Click the **Downloads** tab.
4. Click the **Disconnect Account** button.
5. Click **Done.**

Activate the online banking connection for accounts connected to the financial institution that is requesting this change.

1. Click your account in the Accounts list on the left side.
2. Choose “Accounts” at the top of your page.
3. Select "Set up transaction download".
4. Enter your financial institution name in the search field, select the correct option and click Continue.
5. Enter your financial institution credentials. • Express Web Connect uses the same credentials you use for your institution’s online banking login.
6. 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.
7. Click Continue and then Finish.

Quicken Windows Web Connect

Backup and download Quicken Company file

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 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.

Deactivate and reconnect

1. Deactivate online banking connection for accounts connected to financial institution that is requesting this change.
    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 accounts that apply.
    a. Download a Quicken Web Connect file from your financial institution's online banking site.
    b. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
    c. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
    d. 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.
    e. Repeat this step for each account you have connected to this institution.

Quicken Mac Web Connect

Backup and download Quicken Company file

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.

Deactivate and reconnect

To Deactivate an account

1. Select the account to open its register.
2. Click the **Settings** gear icon in the lower right corner of the register.
3. Click the **Downloads** tab.
4. Click the **Disconnect Account** button.
5. Click **Done.**

Activate online banking connection for accounts connected to financial institution that is requesting this change.

1. Click your account in the Accounts list on the left side.
2. Choose “Accounts” at the top of your page.
3. Select "Set up transaction download".
4. Enter your financial institution name in the search field, select the correct option and click Continue.
5. Enter your financial institution credentials. • Express Web Connect uses the same credentials you use for your institution’s online banking login.
6. 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.
7. Click Continue and then Finish.